

TWO SCOOPS of DJANGO 3.X

BEST PRACTICES FOR THE
DJANGO WEB FRAMEWORK

ALPHA RELEASE

DANIEL ROY GREENFELD
& AUDREY ROY GREENFELD

Two Scoops of Django 3.x

Best Practices for the Django Web Framework

Daniel Roy Greenfeld
Audrey Roy Greenfeld

Two Scoops of Django 3.x: Best Practices for the Django Web Framework
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by Daniel Roy Greenfeld and Audrey Roy Greenfeld

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Dedication

For Malcolm Tredinnick

1971-2013

We miss you.

feldroy.com/pages/malcolm-tredinnick-memorial

About the Dedication

Malcolm Tredinnick wasn't just a Django core developer and reviewer of "Two Scoops of Django: Best Practices for Django 1.5." To us, he was much, much more.

Daniel had worked with Malcolm Tredinnick in the summer of 2010, but we first met him in person at DjangoCon 2010. He was funny and charming, sharply opinionated but always a gentleman; we instantly became close friends.

In 2012, when we co-organized the first PyCon Philippines, as soon as we told him about it, Malcolm instantly declared he was coming. He gave two memorable talks and ran an impromptu all-day Django tutorial. He also pushed and encouraged the local community to work on Filipino language translations for Django, including Tagalog, Tausug, Cebuano, and more.

After the conference, we started working on a book about Django best practices. We gathered friends and colleagues to help us as technical reviewers. Malcolm Tredinnick became the most active of them. He was our mentor and forced us to dig deeper and work harder. He did this while working a day job as the leader of a combined Rails and Haskell team; Malcolm was a true programming language polyglot.

For our book, he provided so much assistance and guidance we tried to figure out a way to include him in the author credits. When we told him about our dilemma, he laughed it off saying, "For a book called 'Two Scoops', you can't have three authors." We suggested he share credit with us on a second book, and he refused, saying he preferred to just comment on our work. He said that he wanted people to have proper references, and for him, simply reviewing our work was contributing to the greater good. Eventually the two of us quietly planned to somehow coerce him into being a co-author on a future work.

After months of effort, we released the first iteration on January 17th, 2013. Malcolm stepped back from Two Scoops of Django, but we stayed in touch. Since Malcolm was unable to attend PyCon US 2013 we weren't sure when we would meet him again.

Two months later, on March 17th, 2013, Malcolm passed away.

We knew Malcolm for less than three years and yet he made an incredible difference in our lives. We've heard many similar stories in the community about Malcolm; he was a friend and mentor to countless others around the world. His last lesson to us went beyond code or writing, he taught us to never take for granted friends, family, mentors, and teachers.

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Forward

The first edition of Two Scoops of Django came out in 2013 when Django was only on version 1.5, and I was just beginning my own Django journey. I still recall the deep frustration of trying to properly wrap my mind around this batteries-included web framework. I had studied Python. Gone through the official Django Polls tutorial multiple times. And read every book and tutorial I could find. But, still, I felt lost. Whenever it came time to build my own Django apps from scratch, I hit a wall. Stack Overflow provided answers to discrete questions, but no larger context of understanding. Open source Django code—what little of it I could find, anyway—seemed hopelessly complex, far beyond my abilities as a budding developer.

In short, I was stuck in the classic tutorial trap that afflicts so many beginners: able to blindly follow along with Django tutorials, yet unable to truly understand what was happening.

And then I found this book. Here, finally, was an opinionated guide to using Django. One that took a holistic approach to the framework and the process of building web applications. At first, I was surprised by the format: it didn’t adopt the traditional step-by-step process of walking through a demo Django application. The book didn’t build a complete website at all. Instead, it was structured like an encyclopedia covering all the major areas of Django. If I wanted to know the proper way to configure, say, my models, I could go to that section, read the advice, and apply it in my projects.

While reading the book I spotted a few typos and gathered the courage to contact the authors, Daniel and Audrey. To my surprise, they responded immediately, thanked me, and several weeks later a signed and illustrated additional copy of the book arrived at my door. I still have that book on my bookshelf.

This type of interaction, welcoming a newcomer into the fold, turns out to be quite common in the Django community. It is perhaps the nicest technology group I know of, and many Django developers feel the same way. There is a saying among those who have been around Django for a while, “Come for the framework, stay for the community.” And it is true.

If you want to become involved, there are multiple ways. The codebase is open source so anyone can submit a pull request. There are also annual DjangoCon conferences in the U.S., Europe, Australia, and Africa, as well as innumerable smaller local meetups and conferences.

As technology continues its relentless march onwards, Django and the broader Python community has kept pace. Since that first version of Two Scoops back in 2013, there have been new editions covering Django 1.6, 1.8, and 1.11, all of which I bought, learning something new and revisiting wise advice I'd read years before. The old debates of Python 2 vs Python 3 and related third-party package support are now settled, replaced by new ones, I suspect, around the new async capabilities in Python that are making their way into Django.

To a newcomer, Django can feel intimidating: it certainly did for me. But thanks to the community and resources like Two Scoops, it is more accessible than ever. I encourage you to join us and, who knows, maybe even make your own contributions.

William Vincent
Django Software Foundation Board Member
Founder of LearnDjango.com
May 2020

Authors' Notes

A Few Words From Daniel Roy Greenfeld

In the spring of 2006, I was working for NASA on a project that implemented a Java-based RESTful web service that was taking weeks to deliver. One evening, when management had left for the day, I reimplemented the service in Python in 90 minutes.

I knew then that I wanted to work with Python.

I wanted to use Django for the front-end of the web service, but management insisted on using a closed-source stack because “Django is only at version 0.9x, hence not ready for real projects.” I disagreed, but stayed happy with the realization that at least the core architecture was in Python. Django used to be edgy during those heady days, and it scared people.

Many years later, Django is considered a mature, powerful, secure, stable framework used by incredibly successful corporations ([OctopusEnergy](#), Instagram, Mozilla, Sentry, etc.) and government agencies (NASA, Library of Congress, et al) all over the world. Convincing management to use Django isn’t hard anymore, and if it is hard to convince them, finding jobs which let you use Django has become much easier.

My goal in this book is to share with you what I’ve learned. My knowledge and experience have been gathered from advice given by core developers, mistakes I’ve made, successes shared with others, and an enormous amount of note taking. I’m going to admit that the book is opinionated, but many of the leaders in the Django community use the same or similar techniques.

This book is for you, the developers. I hope you enjoy it!

A Few Words From Audrey Roy Greenfeld

I first discovered Python in a graduate class at MIT in 2005. In less than 4 weeks of homework assignments, each student built a voice-controlled system for navigating between rooms in MIT’s Stata Center, running on our HP iPaqs running Debian. I was in awe of Python and wondered why it wasn’t used for everything. I tried building a web application with Zope but struggled with it.

A couple of years passed, and I got drawn into the Silicon Valley tech startup scene. I wrote graphics libraries in C and desktop applications in C++ for a startup. At some point, I left that job and picked up painting and sculpture. Soon I was drawing and painting frantically for art shows, co-directing a 140-person art show, and managing a series of real estate renovations. I realized that I was doing a lot at once and had to optimize. Naturally, I turned to Python and began writing scripts to generate some of my artwork. That was when I rediscovered the joy of working with Python.

Many friends from the Google App Engine, SuperHappyDevHouse, and hackathon scenes in Silicon Valley inspired me to get into Django. Through them and through various freelance projects and partnerships I discovered how powerful Django was.

Before I knew it, I was attending PyCon 2010, where I met my husband Daniel Roy Greenfeld. We met at the end of James Bennett’s “Django In Depth” tutorial, and now this chapter in our lives has come full circle with the publication of this book.

Django has brought more joy to my life than I thought was possible with a web framework. My goal with this book is to give you the thoughtful guidance on common Django development practices that are normally left unwritten (or implied), so that you can get past common hurdles and experience the joy of using the Django web framework for your projects.

Introduction

Our aim in writing this book is to write down all of the unwritten tips, tricks, and common practices that we've learned over the years while working with Django.

While writing, we've thought of ourselves as scribes, taking the various things that people assume are common knowledge and recording them with simple examples.

A Word About Our Recommendations

Like the official Django documentation, this book covers how to do things in Django, illustrating various scenarios with code examples.

Unlike the Django documentation, this book recommends particular coding styles, patterns, and library choices. While core Django developers may agree with some or many of these choices, keep in mind that many of our recommendations are just that: personal recommendations formed after years of working with Django.

Throughout this book, we advocate certain practices and techniques that we consider to be the best approaches. We also express our own personal preferences for particular tools and libraries.

Sometimes we reject common practices that we consider to be anti-patterns. For most things we reject, we try to be polite and respectful of the hard work of the authors. There are the rare, few things that we may not be so polite about. This is in the interest of helping you avoid dangerous pitfalls.

We have made every effort to give thoughtful recommendations and to make sure that our practices are sound. We've subjected ourselves to harsh, nerve-wracking critiques from Django and Python core developers whom we greatly respect. We've had this book reviewed by more technical reviewers than the average technical book, and we've poured countless hours into revisions. That being said, there is always the possibility of errors or omissions. There is also the possibility that better practices may emerge than those described here.

We are fully committed to iterating on and improving this book, and we mean it. If you see any practices that you disagree with or anything that can be done better, we humbly ask that you send us your suggestions for improvements. The best way to send us feedback is to file an issue at

github.com/feldroy/two-scoops-of-django-3.x/issues.

Please don't hesitate to tell us what can be improved. We will take your feedback constructively.

Why Two Scoops of Django?

Like most people, we, the authors of this book, love ice cream. Every Saturday night we throw caution to the wind and indulge in ice cream. Don't tell anyone, but sometimes we even have some when it's not Saturday night!

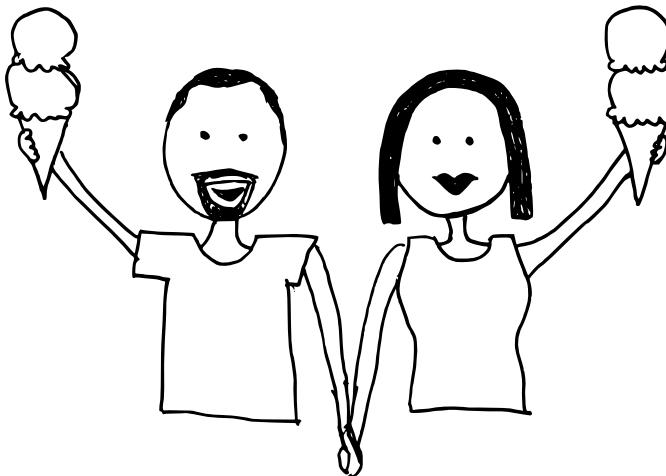


Figure 1: Throwing caution to the wind.

We like to try new flavors and discuss their merits against our old favorites. Tracking our progress through all these flavors, and possibly building a club around it, makes for a great sample Django project.

When we do find a flavor we really like, the new flavor brings a smile to our face, just like when we find great tidbits of code or advice in a technical book. One of our goals for this book is to write the kind of technical book that brings the ice cream smile to readers.

Best of all, using ice cream analogies has allowed us to come up with more vivid code examples. We've had a lot of fun writing this book. You may see us go overboard with ice cream silliness here and there; please forgive us.

Before You Begin

This book is not a tutorial. If you are new to Django, this book will be helpful but large parts will be challenging for you. To use this book to its fullest extent, you should have an understanding of the Python programming language and have at least gone through either the [official Django tutorial](#), the entire Django Crash Course tutorial ([feldroy.com/products/django-crash-course](#)), or other similar introductory resources. Experience with object-oriented programming is also very useful.

This Book Is Intended for Django 3.x and Python 3.8 or 3.9

This book will work well with the Django 3.x series, less so with Django 2.2, and so on. Even though we make no promises about functional compatibility, at least the general approaches from most of this book stand up over every post-1.0 version of Django.

As for the Python version, this book is tested on Python 3.8. Most code examples should work on Python 3.7.x and 3.6.x. Anything below that will certainly break.

Each Chapter Stands on Its Own

Unlike tutorial and walkthrough books where each chapter builds upon the previous chapter's project, we've written this book in a way that each chapter intentionally stands by itself.

We've done this in order to make it easy for you to reference chapters about specific topics when needed while you're working on a project.

The examples in each chapter are completely independent. They aren't intended to be combined into one project and are not a tutorial. Consider them useful, isolated snippets that illustrate and help with various coding scenarios.

Conventions Used in This Book

Code examples like the following are used throughout the book:

Example 1: Code Example

```
class Scoop:  
    def __init__(self):  
        self._is_yummy = True
```

To keep these snippets compact, we sometimes violate the PEP 8 conventions on comments and line spacing. Code samples are available online at [github.com/feldroy/two-scoops-of-django-3.x](#).

Special “Don’t Do This!” code blocks like the following indicate examples of bad code that you should avoid:

Example 2: “Don’t Do This!” Code Example

```
class Scoop:  
    def __init__(self):  
        self._is_yummy = False
```

We use the following typographical conventions throughout the book:

- Constant width or shaded constant width for code fragments or commands.
- *Italic* for filenames.
- **Bold** when introducing a new term or important word.

Boxes containing notes, warnings, tips, and little anecdotes are also used in this book:

TIP: Something You Should Know

Tip boxes give handy advice.

WARNING: Some Dangerous Pitfall

Warning boxes help you avoid common mistakes and pitfalls.

PACKAGE TIP: Some Useful Package Recommendation

Indicates notes about useful third-party packages related to the current chapter, and general notes about using various Python, Django, and front-end packages.

We also provide a complete list of packages recommended throughout the book in [Chapter 37: Appendix A: Packages Mentioned In This Book](#).

We also use tables to summarize information in a handy, concise way:

Core Concepts

When we build Django projects, we keep the following concepts in mind.

Keep It Simple, Stupid

Kelly Johnson, one of the most renowned and prolific aircraft design engineers in the history of aviation, said it this way about 50 years ago.

	Daniel	Audrey
Can be fed coconut ice cream	Yes	Yes
Favorite ice cream flavors of the moment	Pumpkin	Mint Chocolate Chip

Authors' Ice Cream Preferences

When building software projects, each piece of unnecessary complexity makes it harder to add new features and maintain old ones. Attempt the simplest solution, but take care not to implement overly simplistic solutions that make bad assumptions. This concept is sometimes abbreviated as “KISS.”

Fat Models, Utility Modules, Thin Views, Stupid Templates

When deciding where to put a piece of code, we like to follow the “Fat Models, Utility Modules, Thin Views, Stupid Templates” approach.

We recommend that you err on the side of putting more logic into anything but views and templates. The results are pleasing. The code becomes clearer, more self-documenting, less duplicated, and a lot more reusable. As for template tags and filters, they should contain the least amount of logic possible to function.

We cover this further in:

[Fat Models](#) [Section 6.7: Understanding Fat Models](#)

[Utility Modules](#) [Section 31.2: Optimize Apps With Utility Modules](#)

[Thin Views](#) [Section 8.5: Try to Keep Business Logic Out of Views](#)

[Stupid Templates I](#) [Section 14.9: Follow a Minimalist Approach](#)

[Stupid Templates II](#) [Chapter 15: Template Tags and Filters](#)

Start With Django by Default

Before we consider switching out core Django components for things like alternative template engines, different ORMs, or non-relational databases, we first try an implementation using standard Django components. If we run into obstacles, we explore all possibilities before replacing core Django components.

See [Chapter 20: Tradeoffs of Replacing Core Components](#).

Be Familiar with Django's Design Philosophies

It is good to periodically read the documentation on Django's design philosophy because it helps us understand why Django provides certain constraints and tools. Like any framework, Django is more than just a tool for providing views, it's a way of doing things designed to help us put together maintainable projects in a reasonable amount of time.

Reference docs.djangoproject.com/en/3.2/misc/design-philosophies/

The Twelve-Factor App

A comprehensive approach to web-based application design, the *Twelve-Factor App* approach is growing in popularity amongst many senior and core Django developers. It is a methodology for building deployable, scalable applications worth reading, and understanding. Parts of it closely match the practices espoused in Two Scoops of Django, and we like to think of it as suggested reading for any web-based application developer.

See 12factor.net

Our Writing Concepts

When we wrote this book, we wanted to provide to the reader and ourselves the absolute best material possible. To do that, we adopted the following principles:

Provide the Best Material

We've done our absolute best to provide the best material possible, going to the known resources on every topic covered to vet our material. We weren't afraid to ask questions! Then we distilled the articles, responses, and advice of experts into the content that exists in the book today. When that didn't suffice, we came up with our own solutions and vetted them with various subject matter experts. It has been a lot of work, and we hope you are pleased with the results.

If you are curious about the differences between this edition (Django 3.x) and the previous edition (Django 1.11) of the book, you can find the shortlist of changes at github.com/feldroy/two-scoops-of-django-3.x/blob/master/changelog.md

Stand on the Shoulders of Giants

While we take credit and responsibility for our work, we certainly did not come up with all the practices described in this book on our own.

Without all of the talented, creative, and generous developers who make up the Django, Python, and general open source software communities, this book would not exist. We strongly believe in recognizing the people who have served as our teachers and mentors as well as our sources of information, and we've tried our best to give credit wherever credit is due.

Listen to Our Readers and Reviewers

In the previous editions of this book, we received a huge amount of feedback from a veritable legion of readers and reviewers. This allowed us to greatly improve the quality of the book. It is now at a level that we hoped for but never expected to achieve.

In return, we've shared credit at the back of the book and are continually working on ways to pay it forward by improving the lives of developers around the world.

If you have any questions, comments, or other feedback about this edition, please share your input by submitting issues in our issue tracker, at:

- github.com/feldroy/two-scoops-of-django-3.x/issues

Also, at the end of the book is a link to leave a review for Two Scoops of Django on Amazon. Doing this will help others make an informed decision about whether this book is right for them.

Publish Issues and Errata

Nothing is perfect, even after extensive review cycles. We will be publishing issues and errata at the Two Scoops of Django 3.x GitHub repo:

- github.com/feldroy/two-scoops-of-django-3.x

1 | Coding Style

A little attention to following standard coding style guidelines will go a long way. We highly recommend that you read this chapter, even though you may be tempted to skip it.

1.1 The Importance of Making Your Code Readable

Programs must be written for people to read, and only incidentally for machines to execute.

– Structure and Interpretation of Computer Programs by Abelson and Sussman

Code is read more than it is written. An individual block of code takes moments to write, minutes or hours to debug, and can last forever without being touched again. It's when you or someone else visits code written yesterday or ten years ago that having code written in a clear, consistent style becomes extremely useful. Understandable code frees mental bandwidth from having to puzzle out inconsistencies, making it easier to maintain and enhance projects of all sizes.

What this means is that you should go the extra mile to make your code as readable as possible:

- Avoid abbreviating variable names.
- Write out your function argument names.
- Document your classes and methods.
- Comment your code.
- Refactor repeated lines of code into reusable functions or methods.
- Keep functions and methods short. A good rule of thumb is that scrolling should not be necessary to read an entire function or method.

When you come back to your code after time away from it, you'll have an easier time picking up where you left off.

Take those pesky abbreviated variable names, for example. When you see a variable called `balance_sheet_decrease`, it's much easier to interpret in your mind than an abbreviated variable like `bsd` or `bal_s_d`. These types of shortcuts may save a few seconds of typing, but those savings come at the expense of hours or days of technical debt. It's not worth it.

1.2 PEP 8

PEP 8 is the official style guide for Python. We advise reading it in detail and learn to follow the PEP 8 coding conventions: python.org/dev/peps/pep-0008/

PEP 8 describes coding conventions such as:

- “Use 4 spaces per indentation level.”
- “Separate top-level function and class definitions with two blank lines.”
- “Method definitions inside a class are separated by a single blank line.”

All the Python files in your Django projects should follow PEP 8. If you have trouble remembering the PEP 8 guidelines, find a plugin for your code editor that checks your code as you type.

When an experienced Python programmer sees gross violations of PEP 8 in a Django project, even if they don't say anything, they are probably thinking bad things. Trust us on this one.

WARNING: Don't Change an Existing Project's Conventions

The style of PEP 8 applies to new Django projects only. If you are brought into an existing Django project that follows a different convention than PEP 8, then follow the existing conventions.

Please read the “A Foolish Consistency is the Hobgoblin of Little Minds” section of PEP 8 for details about this and other reasons to break the rules:

- python.org/dev/peps/pep-0008/#a-foolish-consistency-is-the-hobgoblin-of-little-minds

PACKAGE TIP: Use Black to format Python Code

Black is an uncompromising Python code formatter created by Łukasz Langa. By using it, we give up our control over the minutiae of hand-wrangling code into legibility, and in return it gives us speed and determinism in how our code will look. We love it as it frees us up from format noodling so we can get our work done. We hook it into our code submission processes. You can find out more at

github.com/psf/black.

PACKAGE TIP: Use Flake8 for Checking Code Quality

Created by Tarek Ziadé and now maintained by the PyCQA group, Flake8 is a very useful command-line tool for checking coding style, quality, and logic errors in projects. Use while developing locally and as a component of Continuous Integration. See github.com/PyCQA/flake8

1.2.1 The 79-Character Limit

No joke, I still deal with consoles that are restricted to 80 characters.

- Barry Morrison, Systems Engineer and tech reviewer of Two Scoops of Django.

According to PEP 8, the limit of text per line is 79 characters. This exists because it's a safe value that most text-wrapping editors and developer teams can accommodate without hurting the understandability of code.

However, PEP 8 also has a provision for relaxing this limit to 99 characters for exclusive team projects. We interpret this to mean projects that are not open source.

Our preference is as follows:

- On open source projects, there should be a hard 79-character limit. Our experience has shown that contributors or visitors to these projects will grumble about line length issues; however, it has not kept contributors away and we feel the value isn't lost.
- On private projects, we relax the limit to 99 characters, taking full advantage of modern monitors.

Please read python.org/dev/peps/pep-0008/#maximum-line-length

TIP: Aymeric Augustin on Line Length Issues

Django core developer Aymeric Augustin says, “Fitting the code in 79 columns is never a good reason to pick worse names for variables, functions, and classes. It’s much more important to have readable variable names than to fit in an arbitrary limit of hardware from three decades ago.”

1.3 The Word on Imports

PEP 8 suggests that imports should be grouped in the following order:

- ❶ Standard library imports
- ❷ Related third-party imports
- ❸ Local application or library-specific imports

When we're working on a Django project, our imports look something like the following:

Example 1.1: Good Python Imports

```
# Stdlib imports
from math import sqrt
from os.path import abspath

# Core Django imports
from django.db import models
from django.utils.translation import gettext_lazy as _

# Third-party app imports
from django_extensions.db.models import TimeStampedModel

# Imports from your apps
from splits.models import BananaSplit
```

(Note: you don't actually need to comment your imports like this. The comments are just here to explain the example.)

The import order in a Django project is:

- ❶ Standard library imports.
- ❷ Imports from core Django.
- ❸ Imports from third-party apps including those unrelated to Django.
- ❹ Imports from the apps that you created as part of your Django project. (You'll read more about apps in [Chapter 4: Fundamentals of Django App Design](#).)

PACKAGE TIP: isort for Sorting Imports

The isort Python library sorts your imports so we don't have to. It imports alphabetically and automatically separates our imports into sections and by type.

1.4 Understand Explicit Relative Imports

When writing code, it's important to do so in such a way that it's easier to move, rename, and version your work. In Python, explicit relative imports are a powerful tool for separating individual modules from being tightly coupled to the architecture around them. Since Django apps are simply Python packages, the same rules apply.

To illustrate the benefits of explicit relative imports, let's explore an example. Imagine that the following snippet is from a Django project that you created to track your ice cream consumption, including all of the waffle/sugar/cake cones that you have ever eaten.

Example 1.2: Relative Python Imports

```
# cones/views.py
from django.views.generic import CreateView

# Relative imports of the 'cones' package
from .models import WaffleCone
from .forms import WaffleConeForm

# absolute import from the 'core' package
from core.views import FoodMixin

class WaffleConeCreateView(FoodMixin, CreateView):
    model = WaffleCone
    form_class = WaffleConeForm
```

By understanding the difference between absolute and explicit relative imports, we can immediately tell our local/internal imports from global/external imports, highlighting the Python package as a unit of code.

To summarize, here's a table of the different Python import types and when to use them in Django projects:

Code	Import Type	Usage
from core.views import FoodMixin	absolute import	Use when importing from outside the current app
from .models import WaffleCone	explicit relative	Use when importing from another module in the current app

Table 1.1: Imports: Absolute vs. Explicit Relative

Get into the habit of using explicit relative imports. It's very easy to do, and using explicit relative imports is a good habit for any Python programmer to develop.

TIP: Doesn't PEP 328 Clash With PEP 8?

See what Guido van Rossum, BDFL of Python says about it:

► python.org/pipermail/python-dev/2010-October/104476.html

Additional reading: python.org/dev/peps/pep-0328/

1.5 Avoid Using Import *

In 99 percent of all our work, we explicitly import each module:

Example 1.3: Explicit Python Imports

```
from django import forms
from django.db import models
```

Never do the following:

Example 1.4: Import *

```
# ANTI-PATTERN: Don't do this!
from django.forms import *
from django.db.models import *
```

The reason for this is to avoid implicitly loading all of another Python module's locals into and over our current module's namespace, this can produce unpredictable and sometimes catastrophic results.

We do cover a specific exception to this rule in [Chapter 5: Settings and Requirements Files](#).

Let's look at the bad code example above. Both the Django forms and Django models libraries have a class called `CharField`. By implicitly loading both libraries, the models library overwrote the forms version of the class. This can also happen with Python built-in libraries and other third-party libraries overwriting critical functionality.

Using `import *` is like being that greedy customer at an ice cream shop who asks for a free taster spoon of all thirty-one flavors, but who only purchases one or two scoops. Don't import everything if you're only going to use one or two things.

If the customer then walked out with a giant ice cream bowl containing a scoop of every or almost every flavor, though, it would be a different matter.

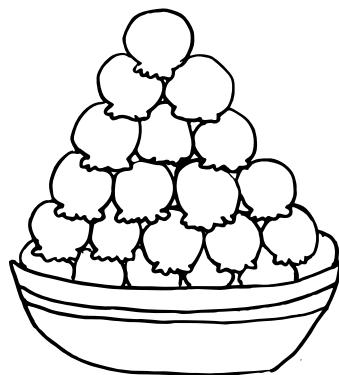


Figure 1.1: Using import * in an ice cream shop.

1.5.1 Other Python Naming Collisions

You'll run into similar problems if you try to import two things with the same name, such as:

Example 1.5: Python Module Collisions

```
# ANTI-PATTERN: Don't do this!
from django.db.models import CharField
from django.forms import CharField
```

If you need to avoid a naming collision of this nature, you can always use aliases to overcome them:

Example 1.6: Using Aliases to Avoid Python Module Collisions

```
from django.db.models import CharField as ModelCharField
from django.forms import CharField as FormCharField
```

1.6 Django Coding Style

This section covers both the official guidelines as well as unofficial but commonly-accepted Django conventions.

1.6.1 Consider the Django Coding Style Guidelines

It goes without saying that it's a good idea to be aware of common Django style conventions. In fact, internally Django has its own set of style guidelines that extend PEP 8:

- docs.djangoproject.com/en/3.2/internals/contributing/writing-code/coding-style/

Additionally, while the following are not specified in the official standards, they are common enough in the Django community that you will probably want to follow them in your projects.

TIP: Review the Documentation on Django Internals

The documentation on Django internals holds a lot more than just coding style. They're chock-full of useful information, including the history of the Django project, the release process, and more! We recommend you check them out.

docs.djangoproject.com/en/3.2/internals/

1.6.2 Use Underscores in URL Pattern Names Rather Than Dashes

We always try to use underscores (the “_” character) over dashes. This isn't just more Pythonic, it's friendlier to more IDEs and text editors. Note that we are referring to the name argument of `url()` here, not the actual URL typed into the browser.

The wrong way, with dashes in url names:

Example 1.7: Bad URL Pattern Names

```
patterns = [
    path(route='add/',
         view=views.add_topping,
         name='add-topping'),
]
```

The right way, with underscores in url names:

Example 1.8: Good URL Pattern Names

```
patterns = [
    path(route='add/',
        view=views.add_topping,
        name='toppings:add_topping'),
]
```

Dashes in actual URLs are fine (e.g. `route='add-topping/'`).

1.6.3 Use Underscores in Template Block Names Rather Than Dashes

For the same reasons as using underscores in URL pattern names, we recommend using underscores when defining names of template blocks: in this case, they're more Pythonic and more editor-friendly.

1.7 Choose JS, HTML, and CSS Style Guides

1.7.1 JavaScript Style Guides

Unlike Python which has one official style guide, there is no official JavaScript style guide. Instead, a number of unofficial JS style guides have been created by various individuals and/or companies:

- Standard combined JavaScript and Node.js Style Guide github.com/standard/standard
- idiomatic.js: Principles of Writing Consistent, Idiomatic JavaScript github.com/rwaldron/idiomatic.js
- Airbnb JavaScript Style Guide github.com/airbnb/javascript

There is no consensus in the Django or JavaScript communities on any one of these, so just pick your favorite and stick with it.

However, if you are using a JavaScript framework with a style guide of its own, you should use that guide. For example, ember.js has its own style guide.

PACKAGE TIP: ESLint: A Pluggable Linting Utility for JavaScript and JSX

ESLint (eslint.org) is a tool for checking JavaScript and JSX code styles. It has presets for the JS style rules of several style guides, including a few of those listed above. There are also ESLint plugins for various text editors and ESLint tasks for

various JavaScript tools like Webpack, Gulp, and Grunt.

1.7.2 HTML and CSS Style Guides

- ▶ Code Guide by [@mdo](#) for HTML and CSS: [codeguide.co](#)
- ▶ idomatic-css: Principles of Writing Consistent, Idiomatic CSS:
[github.com/necolas/idomatic-css](#)

PACKAGE TIP: stylelint

Stylelint ([stylelint.io](#)) is a coding style formatter for CSS. It checks for consistency against the rules for which you configure it, and checks the sort order of your CSS properties. Just as for ESLint, there are stylelint text editor and task/build tool plugins.

1.8 Never Code to the IDE (Or Text Editor)

There are developers who make decisions about the layout and implementation of their project based on the features of IDEs (Integrated Development Environment). This can make the discovery of project code extremely difficult for anyone whose choice of development tool doesn't match the original author.

Always assume that the developers around you like to use their own tools and that your code and project layout should be transparent enough that someone stuck using Notepad or Nano will be able to navigate your work.

For example, introspecting **template tags** or discovering their source can be difficult and time consuming for developers not using a very, very limited pool of IDEs. Therefore, we follow the commonly-used naming pattern of `<app_name>_tags.py`.

1.9 Summary

This chapter covered our preferred coding style and explained why we prefer each technique.

Even if you don't follow the coding style that we use, please follow a consistent coding style. Projects with varying styles are much harder to maintain, slowing development, and increasing the chances of developer mistakes.

2 | The Optimal Django Environment Setup

This chapter describes what we consider the best local environment setup for intermediate and advanced developers working with Django.

2.1 Use the Same Database Engine Everywhere

A common developer pitfall is using `SQLite3` for local development and `PostgreSQL` (or `MySQL`) in production. This section applies not only to the `SQLite3/PostgreSQL` scenario but to any scenario where you're using two different databases and expecting them to behave identically.

Here are some of the issues we've encountered with using different database engines for development and production:

2.1.1 You Can't Examine an Exact Copy of Production Data Locally

When your production database is different from your local development database, you can't grab an exact copy of your production database to examine data locally.

Sure, you can generate an `SQL` dump from production and import it into your local database, but that doesn't mean that you have an exact copy after the export and import.

2.1.2 Different Databases Have Different Field Types/Constraints

Keep in mind that different databases handle **type casting** of field data differently. Django's ORM attempts to accommodate those differences, but there's only so much that it can do.

For example, some people use `SQLite3` for local development and `PostgreSQL` in production, thinking that the Django ORM gives them the excuse not to think about the differences. Eventually, they run into problems, since `SQLite3` has dynamic, weak typing instead of strong typing.

Yes, the Django ORM has features that allow your code to interact with SQLite3 in a more strongly typed manner, but form and model validation mistakes in development will go uncaught (even in tests) until the code goes to a production server. You may be saving long strings locally without a hitch, for example, since SQLite3 won't care. But then in production, your PostgreSQL or MySQL database will throw constraint errors that you've never seen locally, and you'll have a hard time replicating the issues until you set up an identical database locally.

Most problems usually can't be discovered until the project is run on a strongly typed database (e.g. PostgreSQL or MySQL). When these types of bugs hit, you end up kicking yourself and scrambling to set up your local development machine with the right database.

TIP: Django+PostgreSQL Rocks

Most Django developers that we know prefer to use PostgreSQL for all environments: development, staging, QA, and production systems.

Depending on your operating system, use these instructions:

- ▶ Mac: Download the one-click Mac installer at postgresapp.com
- ▶ Windows: Download the one-click Windows installer at postgresql.org/download/windows/
- ▶ Linux: Install via your package manager, or follow the instructions at postgresql.org/download/linux/

PostgreSQL may take some work to get running locally on some operating systems, but we find that it's well worth the effort.

2.1.3 Fixtures Are Not a Magic Solution

You may be wondering why you can't simply use **fixtures** to abstract away the differences between your local and production databases.

Well, fixtures are great for creating simple hardcoded test data sets. Sometimes you need to pre-populate your databases with fake test data during development, particularly during the early stages of a project.

Fixtures are not a reliable tool for migrating large data sets from one database to another in a database-agnostic way. They are simply not meant to be used that way. Don't mistake the ability of fixtures to create basic data (`dumpdata`/`loaddata`) with the capability to migrate production data between database tools.

WARNING: Don't Use SQLite3 with Django in Production

For any web project with more than one user, or requiring anything but light concurrency, SQLite3 is a nightmare in the making. In the simplest terms possible, SQLite3 works great in production until it doesn't. We've experienced it ourselves, and heard horror stories from others.

This issue compounds itself with the difficulty and complexity involved in migrating data out of SQLite3 and into something designed for concurrency (e.g., PostgreSQL) when problems eventually arise.

While we're aware that there are plenty of articles advocating the use of SQLite3 in production, the fact that a tiny group of SQLite3 power users can get away with it for particular edge cases is not justification for using it in production Django.



2.2 Use Pip and (Virtualenv or venv)

If you are not doing so already, we strongly urge you to familiarize yourself with both pip and virtualenv. They are the de facto standard for Django projects, and most companies that use Django rely on these tools.

Pip is a tool that fetches Python packages from the **Python Package Index** and its mirrors. It is used to manage and install Python packages and it comes with most non-Linux Python installations.

Virtualenv is a tool for creating isolated Python environments for maintaining package dependencies. It's great for situations where you're working on more than one project at a time, and where there are clashes between the version numbers of different libraries that your projects use.

For example, imagine that you're working on one project that requires Django 3.0 and another that requires Django 3.2.

- Without virtualenv (or an alternative tool to manage dependencies), you have to reinstall Django every time you switch projects.
- If that sounds tedious, keep in mind that most real Django projects have at least a dozen dependencies to maintain.

Pip is already included in Python 3.4 and higher. Further reading and installation instructions can be found at:

- pip: pip.pypa.io
- virtualenv: virtualenv.pypa.io

PACKAGE TIP: Virtualenv Alternative: Conda

Conda is an open source package management system and environment management system that runs on Windows, Mac, and Linux. Originating from the data science community, of all the packaging environments, it is the easiest for users on Windows platforms who want to install compiled binaries. Conda also makes the handling of multiple Python versions trivial. At the moment, this is Daniel's preferred development, he uses it with pip to manage his dependencies.

More information: docs.conda.io/

PACKAGE TIP: Pip+Virtualenv Alternatives: Poetry and Pipenv

Poetry helps you declare, manage, and install dependencies of Python projects, ensuring you have the right stack everywhere. We appreciate how it elegantly encapsulates so much functionality in an intuitive CLI. It is popular and stable enough to be a dependency management platform we can recommend.

More information: python-poetry.org

Pipenv is a tool that wraps pip and virtualenv into a single interface. It automates processes like creating environments and introduces **Pipfile.lock**, a file that allows for deterministic builds.

More information: pipenv.pypa.io/

WARNING: Pip is Not Necessarily Installed by Default on Linux Distros

For many Linux distributions the maintainers remove some modules from the standard Python library and keep them in separated installable packages. For example, on ubuntu you must install *python3-pip*, *python3-setuptools*, *python3-wheel*, and *python3-distutils*.

Since Windows 10 will in the near future come with stable versions of WSL2 (Linux on Windows), this pattern may also affect those users in a similar manner.

2.2.1 virtualenvwrapper

We also highly recommend `virtualenvwrapper` for Mac and Linux or `virtualenvwrapper-win` for Windows. The project was started by Doug Hellman.

Personally, we think `virtualenv` without `virtualenvwrapper` can be a pain to use, because every time you want to activate a virtual environment, you have to type something long like:

Example 2.1: Activating virtualenv

```
$ source ~/.virtualenvs/twoscoops/bin/activate
```

With `virtualenvwrapper`, you'd only have to type:

Example 2.2: Activating virtualenv

```
$ workon twoscoops
```

`Virtualenvwrapper` is a popular companion tool to `pip` and `virtualenv` and makes our lives easier, but it's not an absolute necessity.

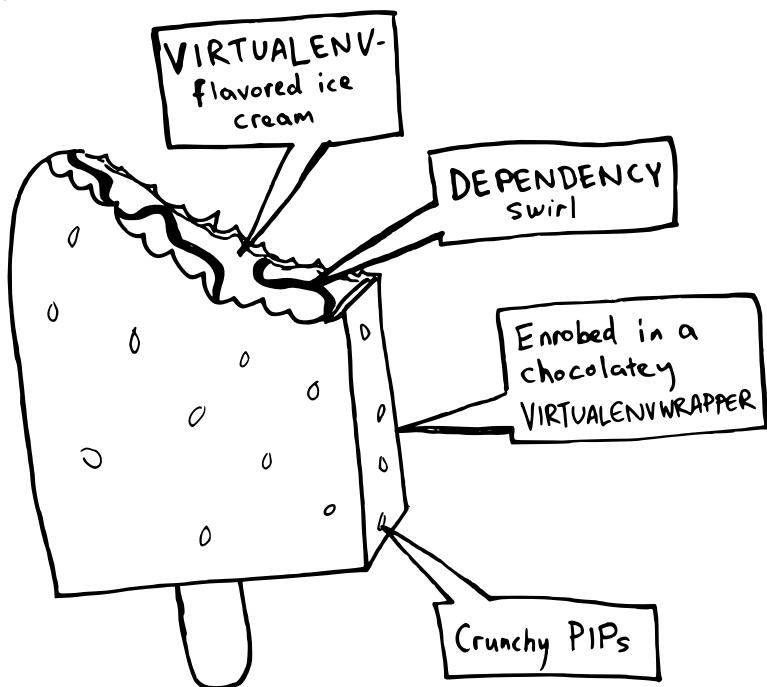


Figure 2.1: Pip, virtualenv, and virtualenvwrapper in ice cream bar form.

2.3 Install Django and Other Dependencies via Pip

The official Django documentation describes several ways of installing Django. Our recommended installation method is with pip and requirements files.

To summarize how this works: a requirements file is like a grocery list of Python packages that you want to install. It contains the name and optionally suitable version range of each package. You use pip to install packages from this list into your virtual environment.

We cover the setup of and installation from requirements files in [Chapter 5: Settings and Requirements Files](#).

TIP: Setting PYTHONPATH

If you have a firm grasp of the command line and environment variables, you can set your virtualenv PYTHONPATH so that the *django-admin* command can be used to serve your site and perform other tasks.

You can also set your virtualenv's PYTHONPATH to include the current directory with the latest version of pip. Running “`pip install -e .`” from your project's root directory will do the trick, installing the current directory as a package that can be

edited in place.

If you don't know how to set this or it seems complicated, don't worry about it and stick with *manage.py*.

Additional reading:

- ▶ hope.simons-rock.edu/~pshields/cs/python/pythonpath.html
- ▶ docs.djangoproject.com/en/3.2/ref/django-admin/

2.4 Use Git For Version Control

Version control systems are also known as revision control or source control. Whenever you work on any Django project, you should use a version control system to keep track of your code changes.

Git is the industry standard for developers of all languages and tools. Git makes it easy to create branches and merge changes. When using a version control system, it's important to not only have a local copy of your code repository but also to use a code hosting service for backups. Fortunately, there are a number of services and tools who host repositories. Of them, we recommend using GitHub (github.com) or GitLab (gitlab.com).

2.5 Optional: Identical Environments

What works on a programmer's laptop might not work in production. But what if your local development environment was identical to your project's staging, test, and production environments?

That said, if the production infrastructure consists of 10,000 servers, it's completely unrealistic to have another 10,000 local servers for development purposes. So when we say identical, we mean "as identical as realistically possible."

These are the environment differences that you can eliminate:

Operating system differences. If we're developing on a Mac or on Windows, and if our site is deployed on Ubuntu Linux, then there are huge differences between how our Django project works locally and how it works in production.

Python setup differences. Let's face it, many developers and sysadmins don't even know which version of Python they have running locally, although no one will admit it. Why? Because setting up Python properly and understanding your setup completely is hard.

Developer-to-developer differences. On large development teams, a lot of time can be wasted trying to debug differences between one developer's setup and another's.

The most common way to set up identical development environments is with Docker.

2.5.1 Docker

At the time of this writing, Docker is the industry standard for containerization of environments. It has excellent support across all operating systems, including Microsoft Windows. Working with Docker is sort of like developing inside of a VM, except more lightweight. Docker containers share the host OS but have their own isolated process and memory space. Furthermore, since Docker uses a [union-capable filesystem](#), containers can be built quickly off of a snapshot plus deltas rather than building from scratch.

For the purposes of local development, its main benefit is that it makes setting up environments that closely match development and production much easier.

For example, if our development laptops run Mac (or Windows, or Centos, etc) but a project's configuration is Ubuntu-specific, we can use Docker via Docker Compose to quickly get a virtual Ubuntu development environment set up locally, complete with all the packages and setup configurations needed for the project. We can:

- Set up identical local development environments for everyone on our project's dev team.
- Configure these local development environments in a way similar to our staging, test, and production servers.

The potential downsides are:

- Extra complexity that is not needed in many situations. For simpler projects where we're not too worried about OS-level differences, it's easier to skip this.
- On older development machines, running even lightweight containers can slow performance to a crawl. Even on newer machines, small but noticeable overhead is added.

References for developing with Docker:

- cookiecutter-django.readthedocs.io/en/latest/developing-locally-docker.html
- <http://bit.ly/1dWnzVW> Real Python article on Django and Docker Compose
- dockerbook.com

2.6 Summary

This chapter covered using the same database in development as in production, pip, virtualenv, venv, conda, poetry, pipenv, version control, and Docker. These are good to have in your tool chest, since they are commonly used not just in Django, but in the majority of Python software development.

3 | How to Lay Out Django Projects

Project layout is one of those areas where core Django developers have differing opinions about what they consider best practice. In this chapter, we present our approach, which is one of the most commonly used ones.

PACKAGE TIP: Django Project Templates

There are a number of project templates that really kickstart a Django project and follow the patterns described in this chapter. Here are several links that may be of use when we bootstrap a project:

- github.com/pydanny/cookiecutter-django
Featured in this chapter.
- github.com/grantmcconaughey/cookiecutter-django-vue-graphql-aws
Also featured in this chapter.
- djangopackages.org/grids/g/cookiecutters/
A list of alternative cookiecutter templates.

3.1 Django 3's Default Project Layout

Let's examine the default project layout that gets created when you run `startproject` and `startapp`:

Example 3.1: Default startproject and startapp

```
django-admin startproject mysite
cd mysite
django-admin startapp my_app
```

Here's the resulting project layout:

Example 3.2: Default Project Layout

```
mysite/
├── manage.py
└── my_app
    ├── __init__.py
    ├── admin.py
    ├── apps.py
    ├── migrations
    │   └── __init__.py
    ├── models.py
    ├── tests.py
    └── views.py
└── mysite
    ├── __init__.py
    ├── asgi.py
    ├── settings.py
    ├── urls.py
    └── wsgi.py
```

There are a number of problems with Django's default project layout. While useful for the tutorial, it's not quite as useful once you are trying to put together a real project. The rest of this chapter will explain why.

3.2 Our Preferred Project Layout

We rely on a modified two-tier approach that builds on what is generated by the `django-admin startproject` management command. Our layouts at the highest level are:

Example 3.3: Project Root Levels

```
<repository_root>/
├── <configuration_root>/
└── <django_project_root>/
```

Let's go over each level in detail:

3.2.1 Top Level: Repository Root

The `<repository_root>` directory is the absolute root directory of the project. In addition to the `<django_project_root>` and `<configuration_root>`, we also include other critical components

like the `README.md`, `docs/` directory, `manage.py`, `.gitignore`, `requirements.txt` files, and other high-level files that are required for deployment and running the project.

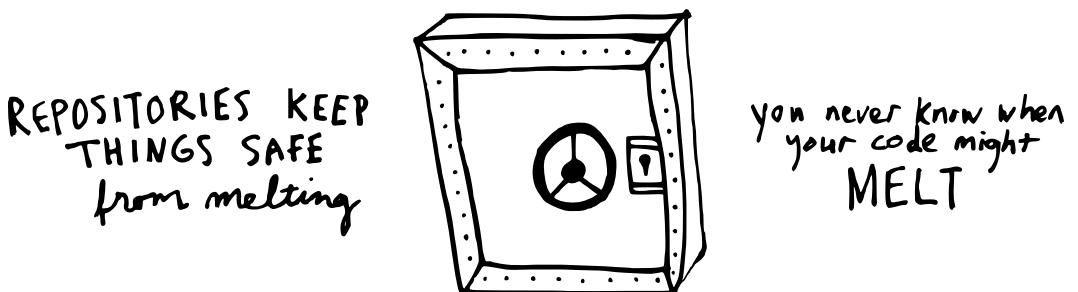


Figure 3.1: Yet another reason why repositories are important.

TIP: Common Practice Varies Here

Some developers like to combine the `<django_project_root>` into the `<repository_root>` of the project.

3.2.2 Second Level: Django Project Root

The `<django_project_root>/` directory is the root of the actual Django project. Non-configuration Python code files are inside this directory, its subdirectories, or below.

If using `django-admin startproject`, you would run the command from within the repository root. The Django project that it generates would then be the project root.

3.2.3 Second Level: Configuration Root

The `<configuration_root>` directory is where the settings module and base URLConf (`urls.py`) are placed. *This must be a valid Python package containing an `__init__.py` module.* Even in Python 3, if the `__init__.py` is not included then the `<configuration_root>` won't be recognized as a python package.

If using `django-admin startproject`, the configuration root is initially inside of the Django project root. It should be moved to the repository root.

The files in the configuration root are part of what is generated by the `django-admin startproject` command.

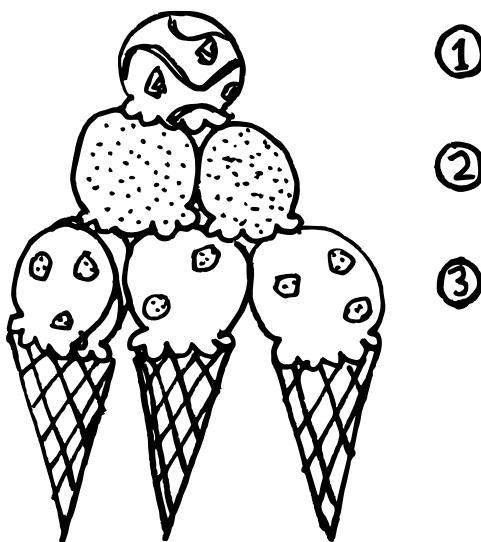


Figure 3.2: Three-tiered scoop layout.

3.3 Sample Project Layout

Let's take a common example: a simple rating site. Imagine that we are creating Ice Cream Ratings, a web application for rating different brands and flavors of ice cream.

This is how we would lay out such a project:

Example 3.4: Layout for icecreamratings

```
icecreamratings_project
├── config/
│   ├── settings/
│   │   ├── __init__.py
│   │   ├── asgi.py
│   │   ├── urls.py
│   └── wsgi.py
├── docs/
└── icecreamratings/
    ├── media/  # Development only!
    ├── products/
    ├── profiles/
    ├── ratings/
    ├── static/
    └── templates/
.gitignore
```

```

├── Makefile
├── README.md
├── manage.py
└── requirements.txt

```

Let's do an in-depth review of this layout. As you can see, in the `icecreamratings_project/` directory, which is the `<repository_root>`, we have the following files and directories. We describe them in the table below:

File or Directory	Purpose
<code>.gitignore</code>	Lists the files and directories that Git should ignore.
<code>config/</code>	The <code><configuration_root></code> of the project, where project-wide <code>settings</code> , <code>urls.py</code> , and <code>wsgi.py</code> modules are placed (We'll cover settings layout later in Chapter 5: Settings and Requirements Files).
<code>Makefile</code>	Contains simple deployment tasks and macros. For more complex deployments you may want to rely on tools like Invoke , Paver , or Fabric .
<code>manage.py</code>	If you leave this in, don't modify its contents. Refer to Chapter 5: Settings and Requirements Files for more details.
<code>README.md</code> and <code>docs/</code>	Developer-facing project documentation. We cover this in Chapter 25: Documentation: Be Obsessed .
<code>requirements.txt</code>	A list of Python packages required by your project, including the Django 3.x package. You'll read more about this in Chapter 23: Django's Secret Sauce: Third-Party Packages .
<code>icecreamratings/</code>	The <code><djangoproject_root></code> of the project.

Table 3.1: Repository Root Files and Directories

When anyone visits this project, they are provided with a high-level view of the project. We've found that this allows us to work easily with other developers and even non-developers. For example, it's not uncommon for designer-focused directories to be created in the root directory.

Inside the `icecreamratings_project/icecreamratings` directory, at the `<djangoproject_root>`, we place the following files/directories:

File or Directory	Purpose
<i>media/</i>	For use in development only: user-generated static media assets such as photos uploaded by users. For larger projects, this will be hosted on separate static media server(s).
<i>products/</i>	App for managing and displaying ice cream brands.
<i>profiles/</i>	App for managing and displaying user profiles.
<i>ratings/</i>	App for managing user ratings.
<i>static/</i>	Non-user-generated static media assets including CSS, JavaScript, and images. For larger projects, this will be hosted on separate static media server(s).
<i>templates/</i>	Where you put your site-wide Django templates.

Table 3.2: Django Project Files and Directories

TIP: Conventions for Static Media Directory Names

In the example above, we follow the official Django documentation's convention of using *static/* for the (non-user-generated) static media directory.

If you find this confusing, there's no harm in calling it *assets/* or *site_assets/* instead. Just remember to update your STATICFILES_DIRS setting appropriately.

3.4 What About the Virtualenv?

Notice how there is no virtualenv directory anywhere in the project directory or its subdirectories? That is completely intentional.

A good place to create the virtualenv for this project would be a separate directory where you keep all of your virtualenvs for all of your Python projects. We like to put all our environments in one directory and all our projects in another.

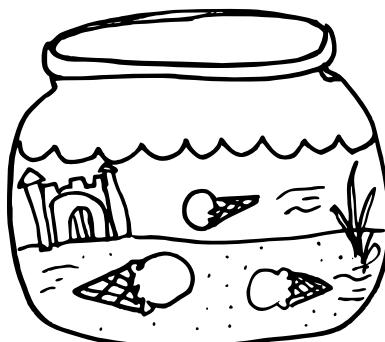


Figure 3.3: An isolated environment, allowing your ice cream to swim freely.

For example, on Mac or Linux:

Example 3.5: On Mac or Linux

```
~/projects/icecreamratings_project/
~/envs/icecreamratings/
```

On Windows:

Example 3.6: On Windows

```
c:\projects\icecreamratings_project\
c:\envs\icecreamratings\
```

If you're using `virtualenvwrapper` (Mac or Linux) or `virtualenvwrapper-win` (Windows), that directory defaults to `~/.virtualenvs/` and the virtualenv would be located at:

Example 3.7: `virtualenvwrapper`

```
~/.virtualenvs/icecreamratings/
```

Also, remember, there's no need to keep the contents of your virtualenv in version control since it already has all the dependencies captured in `requirements.txt`, and since you won't be editing any of the source code files in your virtualenv directly. Just remember that `requirements.txt` does need to remain in version control!

WARNING: Don't Upload Environment Directories To Public Repos

A common mistake by less experienced coders trying to build a GitHub portfolio is to include a `venv` or `icecreamratings_env` directory in public GitHub repos. This is a red flag to people looking over such projects, demonstrating in the clearest terms the inexperience of the person.

The same goes for `.node_modules`.

The way to avoid making this mistake is for all projects to have a `.gitignore` file in the root directory. This ensures that files and directories that shouldn't be added to git and never included in a commit. Useful references:

- help.github.com/en/github/using-git/ignoring-files - GitHub's instructions on the topic.
- github.com/github/gitignore/blob/master/Python.gitignore - A good basic `.gitignore` for python projects.

3.4.1 Listing Current Dependencies

If you have trouble determining which versions of dependencies you are using in your virtualenv, at the command line you can list your dependencies by typing:

Example 3.8: Listing Current Dependencies

```
$ pip freeze
```

With Mac or Linux, you can pipe this into a `requirements.txt` file:

Example 3.9: Saving Current Dependencies to a File

```
$ pip freeze > requirements.txt
```

3.5 Going Beyond `startproject`

Django's `startproject` command allows you to create and use simple Django project templates. However, over time the controls (deployment, front end tooling, etc) around a project grow more and more complex. Most of us hit the limitations of `startproject` quickly and need a more powerful project templating tool. Hence the use of **Cookiecutter** (cookiecutter.readthedocs.io), an advanced project templating tool that can be used for generating Django project boilerplate.

TIP: Audrey on Cookiecutter

I originally created Cookiecutter in 2013 to meet my own Python package boilerplate creation needs. It was the first project to template file paths and file contents identically, an idea I thought was silly but decided to implement anyway.

There are now thousands of Cookiecutter templates for Python, Django, FastAPI, C, C++, JavaScript, Ruby, LaTeX/XeTeX, Berkshelf-Vagrant, HTML, Scala, 6502 Assembly, and more. Numerous companies use Cookiecutter internally to power a variety of tools.

Cookiecutter isn't just a command-line tool, it's a library used by a host of organizations. You can also find it integrated into IDEs such as PyCharm and Visual Studio.

In this section, we present a popular Django project template, rendered by **Cookiecutter**.

3.5.1 Generating Project Boilerplate With Cookiecutter

Here's how Cookiecutter works:

- ① First, it asks you to enter a series of values (e.g. the value for `project_name`).
- ② Then it generates all your boilerplate project files based on the values you entered.

First, install Cookiecutter as per the instructions in the official Cookiecutter documentation.

3.5.2 Generating a Starting Project With Cookiecutter Django

Here's how you would use Cookiecutter to generate your Django 3 boilerplate from `Cookiecutter Django`:

Example 3.10: Using Cookiecutter and Cookiecutter Django

```
cookiecutter https://github.com/pydanny/cookiecutter-django
You've downloaded /home/quique/.cookiecutters/cookiecutter-django
↪ before. Is it okay to delete and re-download it? [yes]: no
Do you want to re-use the existing version? [yes]: yes
project_name [My Awesome Project]: icecreamratings
project_slug [icecreamratings]:
description [Behold My Awesome Project!]: Support your Ice Cream
↪ Flavour!
author_name [Daniel Roy Greenfeld]:
```

```
<snip for brevity>
```

After filling out all the values, in the directory where you ran Cookiecutter, it will create a directory for your project. In this case with the values entered above, the name of this directory will be *icecreamratings*.

The resulting project files will be roughly similar to the layout example we provided. The project will include settings, requirements, starter documentation, a starter test suite, and more.

TIP: What Are All the Other Files?

Keep in mind that Cookiecutter Django goes much further than the basic project layout components that we outlined earlier in this chapter. It's our ultimate Django project template that we use for our projects, so it has a lot of other bells and whistles.

It's a lot fancier than the default `startproject` template provided by Django. We'd rather have you see our actual, real-life template that we use for our projects than a stripped-down, beginner-oriented template that we don't use.

You are welcome to fork `Cookiecutter Django` and customize it to fit your own Django project needs.

3.6 Other Alternatives to `startproject`

People can get very opinionated about their project layout being the “right” way, but as we mentioned, there’s no one right way.

It’s okay if a project differs from our layout, just so long as things are either done in a hierarchical fashion or the locations of elements of the project (docs, templates, apps, settings, etc) are documented in the root `README.md`.

We encourage you to explore the forks of Cookiecutter Django, and to search for other Cookiecutter-powered Django project templates online. You’ll learn all kinds of interesting tricks by studying other people’s project templates.

TIP: `cookiecutter-django-vue-graphql-aws`

Another good open source Cookiecutter-powered template is Grant McConaughay’s `cookiecutter-django-vue-graphql-aws`. It knits together technology we enjoy (Django, GraphQL, Vue, AWS Lambda + Zappa,

etc.) in a concise manner. What isn't documented is named explicitly. More information can be found at github.com/grantmcconnaughey/cookiecutter-django-vue-graphql-aws

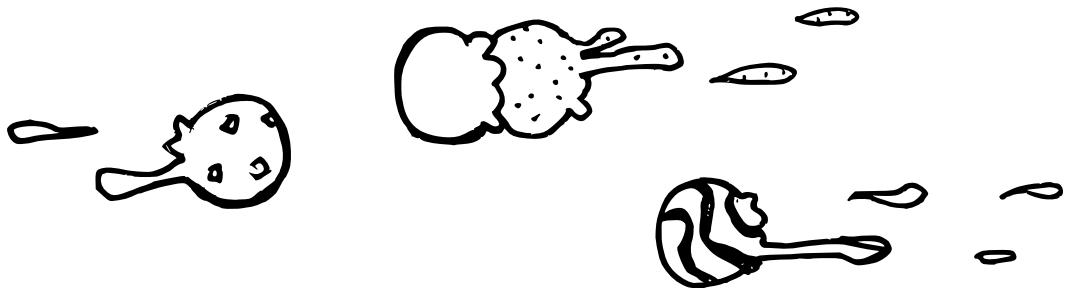


Figure 3.4: Project layout differences of opinion can cause ice cream fights.

3.7 Summary

In this chapter, we covered our approach to basic Django project layout. We provided a detailed example to give you as much insight as possible into our practice. Cookiecutter and two templates are introduced.

Project layout is one of those areas of Django where practices differ widely from developer to developer and group to group. What works for a small team may not work for a large team with distributed resources. Whatever layout is chosen it should be documented clearly.

4 | Fundamentals of Django App Design

It's not uncommon for new Django developers to become understandably confused by Django's usage of the word "app". So before we get into Django app design, it's very important that we go over some definitions.

A Django project is a web application powered by the Django web framework.

Django apps are small libraries designed to represent a single aspect of a project. A Django project is made up of many Django apps. Some of those apps are internal to the project and will never be reused; others are third-party Django packages.

INSTALLED_APPS is the list of Django apps used by a given project available in its INSTALLED_APPS setting.

Third-party Django packages are simply pluggable, reusable Django apps that have been packaged with the Python packaging tools. We'll begin coverage of them in [Chapter 23: Django's Secret Sauce: Third-Party Packages](#).

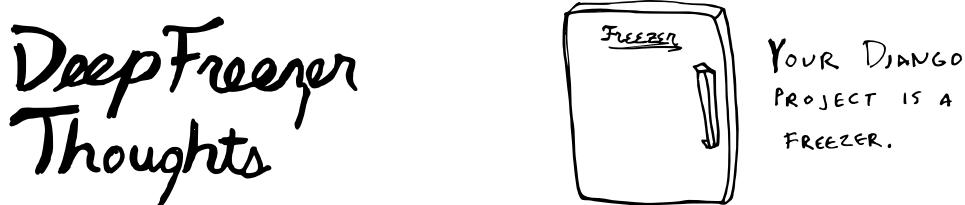


Figure 4.1: It'll make more sense when you see the next figure.



Figure 4.2: Did that make sense? If not, read it again.

4.1 The Golden Rule of Django App Design

James Bennett is a Django core developer. He taught us everything that we know about good Django app design. We quote him:

“The art of creating and maintaining a good Django app is that it should follow the truncated Unix philosophy according to Douglas McIlroy: ‘Write programs that do one thing and do it well.’”

In essence, **each app should be tightly focused on its task**. If an app can't be explained in a single sentence of moderate length, or you need to say 'and' more than once, it probably means the app is too big and should be broken up.

4.1.1 A Practical Example of Apps in a Project

Imagine that we're creating a web application for our fictional ice cream shop called “Two Scoops”. Picture us getting ready to open the shop: polishing the countertops, making the first batches of ice cream, and building the website for our shop.

We'd call the Django project for our shop's website `twoscoops-project`. The apps within our Django project might be something like:

- A *flavors* app to track all of our ice cream flavors and list them on our website.
- A *blog* app for the official Two Scoops blog.
- An *events* app to display listings of our shop's events on our website: events such as Strawberry Sundae Sundays and Fudgy First Fridays.

Each one of these apps does one particular thing. Yes, the apps relate to each other, and you could imagine *events* or *blog* posts that are centered around certain ice cream flavors, but it's much better to have three specialized apps than one app that does everything.

In the future, we might extend the site with apps like:

- A *shop* app to allow us to sell pints by mail order.
- A *tickets* app, which would handle ticket sales for premium all-you-can-eat ice cream fests.

Notice how events are kept separate from ticket sales. Rather than expanding the *events* app to sell tickets, we create a separate *tickets* app because most events don't require tickets, and because event calendars and ticket sales have the potential to contain complex logic as the site grows.

Eventually, we hope to use the *tickets* app to sell tickets to Icecreamlandia, the ice cream theme park filled with thrill rides that we've always wanted to open.

Did we say that this was a fictional example? Ahem...well, here's an early concept map of what we envision for Icecreamlandia:

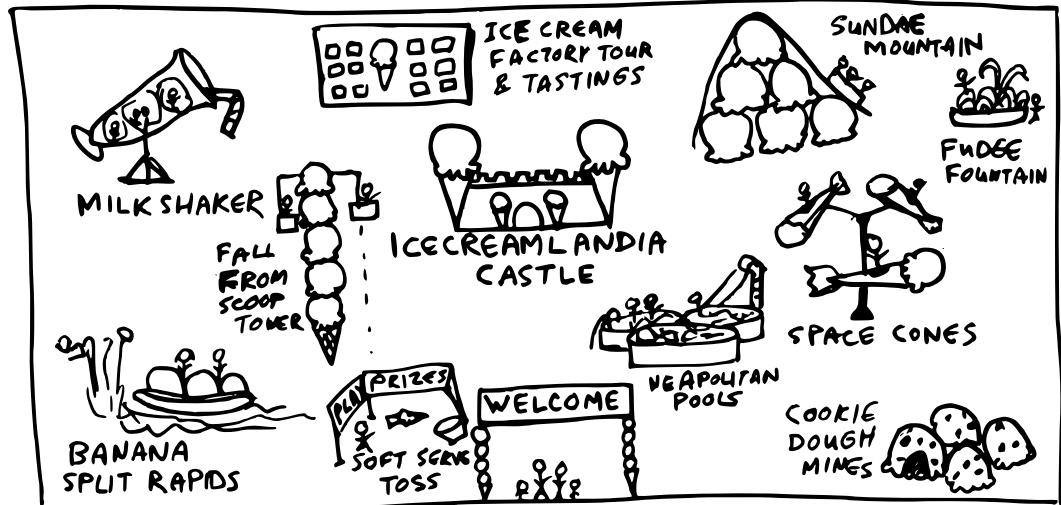


Figure 4.3: Our vision for Icecreamlandia.

4.2 What to Name Your Django Apps

Everyone has their own conventions, and some people like to use really colorful names. We like to use naming systems that are dull, boring, and obvious. In fact, we advocate doing the following:

When possible keep to single word names like *flavors*, *animals*, *blog*, *polls*, *dreams*, *estimates*, and *finances*. A good, easy-to-remember app name makes the project easier to maintain.

As a general rule, the app's name should be a plural version of the app's main model, but there are many good exceptions to this rule, *blog* being one of the most common ones.

Don't just consider the app's main model, though. You should also consider how you want your URLs to appear when choosing a name. If you want your site's blog to appear at <http://www.example.com/weblog/>, then consider naming your app *weblog* rather than *blog*, *posts*, or *blogposts*, even if the main model is *Post*, to make it easier for you to see which app corresponds with which part of the site.

Use valid, PEP 8-compliant, importable Python package names: short, all-lowercase names without numbers, dashes, periods, spaces, or special characters. If needed for readability, you can use underscores to separate words, although the use of underscores is discouraged.

4.3 When in Doubt, Keep Apps Small

Don't worry too hard about getting app design perfect. It's an art, not a science. Sometimes you have to rewrite them or break them up. That's okay.

Try and keep your apps small. Remember, it's better to have many small apps than to have a few giant apps.



Figure 4.4: Two small, single-flavor pints are better than a giant, 100-flavor container.

4.4 What Modules Belong in an App?

In this section, we cover both the common and uncommon Python modules that belong in an app. For those with even a modicum of experience with Django, skipping to [Section 4.4.2: Uncommon App Modules](#) may be in order.

4.4.1 Common App Modules

Here are common modules seen in 99% of Django apps. These will prove very familiar to most readers, but we're placing this here for those just coming into the world of Django. For reference, any module ending with a slash ('/') represents a Python package, which can contain one or more modules.

Example 4.1: Common App Modules

```
# Common modules
scoops/
├── __init__.py
├── admin.py
├── forms.py
├── management/
├── migrations/
├── models.py
├── templatetags/
└── tests/
```

```
├── urls.py  
└── views.py
```

Over time a convention of module names has emerged for building Django apps. By following this convention across the building of apps we set behaviors for ourselves and others, making examining each other's code easier. While Python and Django are flexible enough that most of these don't need to be named according to this convention, not doing so will cause problems. Probably not from an immediate technical perspective, but when you or others look at nonstandard module names later, it will prove to be a frustrating experience.

4.4.2 Uncommon App Modules

Here are less common modules, which may or may not be familiar to many readers:

Example 4.2: Uncommon Django Modules

```
# uncommon modules  
scoops/  
    ├── api/  
    ├── behaviors.py  
    ├── constants.py  
    ├── context_processors.py  
    ├── decorators.py  
    ├── db/  
    ├── exceptions.py  
    ├── fields.py  
    ├── factories.py  
    ├── helpers.py  
    ├── managers.py  
    ├── middleware.py  
    ├── schema.py  
    ├── signals.py  
    ├── utils.py  
    └── viewmixins.py
```

What is the purpose of each module? Most of these have clear English names, but we'll go over a few that might not be so clear.

api/ This is the package we create for isolating the various modules needed when creating an api. See [Section 17.3.1: Use Consistent API Module Naming](#).

behaviors.py An option for locating model mixins per [Section 6.7.1: Model Behaviors a.k.a Mixins](#).

constants.py A good name for placement of app-level settings. If there are enough of them involved in an app, breaking them out into their own module can add clarity to a project.

decorators.py Where we like to locate our decorators. For more information on decorators, see [Section 9.3: Decorators Are Sweet](#).

db/ A package used in many projects for any custom model fields or components.

fields.py is commonly used for form fields but is sometimes used for model fields when there isn't enough field code to justify creating a **db/** package.

factories.py Where we like to place our test data factories. Described in brief in [Section 24.3.5: Don't Rely on Fixtures](#)

helpers.py What we call helper functions. These are where we put code extracted from views ([Section 8.5: Try to Keep Business Logic Out of Views](#)) and models ([Section 6.7: Understanding Fat Models](#)) to make them lighter. Synonymous with **utils.py**

managers.py When **models.py** grows too large, a common remedy is to move any custom model managers to this module.

schema.py This is where code behind **GraphQL** APIs is typically placed.

signals.py While we argue against providing custom signals (see [???: ??](#)), this can be a useful place to put them.

utils.py Synonymous with **helpers.py**

viewmixins.py View modules and packages can be thinned by moving any view mixins to this module. See [Section 10.2: Using Mixins With CBVs](#).

For all of the modules listed in this section, their focus should be at the 'app-level', not global tools. Global-level modules are described in [Section 31.1: Create a Core App for Your Utilities](#).

4.5 Alternative: Ruby on Rails-Style Approaches

Some people have found success using more **Ruby on Rails**-style approaches. Ruby on Rails or **Rails** for short, is a successful Ruby-powered application framework approximately the same age as Django. Notable Rails projects include GitHub, GitLab, Coinbase, Stripe, and Square. There are enough similarities between Django and Rails as well as Python and Ruby to make their approach worth examining.

4.5.1 Service Layers

When coding in Django, it's common for newcomers to struggle determining where business logic should go. The classic example is the process of creating user objects and related data across multiple models and apps. In our case a ticket to enter the Icecreamlandia theme

park:

- ① System creates a user record in a manager method called `create_user()`
- ② `create_user()` uploads a photo of the user to a file hosting system
- ③ `create_user()` also creates a ticket object by calling `create_ticket()`, which is on a manager method called `create_ticket()`
- ④ `create_ticket()` makes an API call to the guest Icecreamlandia check-in app, which is a third-party service

The typical placement for these actions is spread across methods on the managers assigned to the User and Ticket. Others prefer to use class methods instead. So we might see:

Example 4.3: Typical Django Business Logic Placement

```
class UserManager(BaseUserManager):  
    """In users/managers.py"""  
    def create_user(self, email=None, password=None,  
                   avatar_url=None):  
        user = self.model(  
            email=email,  
            is_active=True,  
            last_login=timezone.now(),  
            registered_at=timezone.now(),  
            avatar_url=avatar_url  
        )  
        resize_avatar(avatar_url)  
        Ticket.objects.create_ticket(user)  
        return user  
  
class TicketManager(models.Manager):  
    """In tasks/managers.py"""  
    def create_ticket(self, user: User):  
        ticket = self.model(user=user)  
        send_ticket_to_guest_checkin(ticket)  
        return ticket
```

While this works, the service layer approach argues that there should be separation of concerns between the user object and tickets. Specifically, embedding logic in the User code to call the Ticket code tightly couples the two domains. Thus, a new layer is added to keep concerns separate, and this is called the service layer. Code for this architecture is placed in `service.py` and `selectors.py`.

Example 4.4: Service Layers

```
# Service layer example
scoops/
|--- api/
|--- models.py
|--- services.py # Service layer location for business logic
|--- selectors.py # Service layer location for queries
|--- tests/
```

Under the service layer design, the above code would be executed thus:

Example 4.5: Service Layer Business Logic Placement

```
# In users/services.py
from .models import User
from tickets.models import Ticket, send_ticket_to_guest_checkin

def create_user(email: str, password: str, avatar_url: str) ->
    User:
    user = User(
        email=email,
        password=password,
        avatar_url=avatar_url
    )
    user.full_clean()
    user.resize_avatar()
    user.save()

    ticket = Ticket(user=user)
    send_ticket_to_guest_checkin(ticket)
    return user
```

A popular explanation for this technique can be found at github.com/HackSoftware/Django-Styleguide#services

Advantages to this approach:

- In this simplistic example, 12 lines of code versus 17
- Loose coupling means the user or ticketing code can be more readily replaced
- Separation of concerns makes it easier to do functional tests of individual components

- Adding type annotations of returned objects is easier with this approach than typical Django

Disadvantages to this approach:

- Very rare for projects to replace entire modules without entire rewrites
- For small projects often adds unnecessary complexity
- For complex projects the service layer typically grows to thousands of lines of code, forcing the development of new architecture to support it
- Use of `selectors.py` everywhere forces an extra step any time a simple ORM query could be made
- Django persistence is based on importable business logic placed on the model itself. Service layers remove that capability, removing some advanced techniques

Further refutation of service layers or explanations of how to organize business logic in traditional Django tools can be read in long-time Django maintainer James Bennett's blog and an article by Tom Christie, founder of Django REST Framework:

- b-list.org/weblog/2020/mar/16/no-service/
- b-list.org/weblog/2020/mar/23/still-no-service/
- dabapps.com/blog/django-models-and-encapsulation/

For the authors of Two Scoops of Django the use of service layers isn't new - we've seen it for years. As with any technique that diverges from core Django practices, our anecdotal experience is we've seen projects fail a bit more frequently using service layers. That isn't to say that the approach doesn't have merit, but rather than the additional abstraction may not be worth the effort.

4.5.2 The Large Single App Project

This is where a project puts all code into a single app. While common for small Django projects, larger projects typically don't follow this pattern.

There are positives to this approach. Specifically, migrations are easier and table names follow a simplified pattern.

It has to be said that other frameworks such as Rails embrace this technique and are quite successful. However, while Rails and other tools are designed to follow this pattern, Django isn't optimized for this design. Using this technique with Django requires experience and expertise with patterns rarely described in documentation on Django.

Typically, everything is lumped together in giant `models.py`, `views.py`, `tests.py`, and `urls.py` modules. Eventually either the project collapses under its own growing complexity or the files are broken up into sub-modules based on the domains covered by models. Using our icecreamlandia project, anything about “Users” is placed into `models/users.py` and “Tickets” is placed into `models/tickets.py`.

Please note this can work if done with careful foresight. Indeed, Audrey has done it with a project to great success, it did involve a bit more juggling of code than expected. It’s a technique that should only be explored after a Djangonaut has completed several successful Django projects.

WARNING: Be Careful with Too Divergent Django Architectures

James Beith is a senior engineer whom we respect. He has an interesting take on how to structure a Django project. In his design, James overtly rewrites common patterns for Django. While it appears to work for him, it makes for a harder-to-maintain project in that any new developer on the project has to learn a new paradigm. The charm of Django is heavily based on convention over configuration, and his design explicitly breaks it. While we salute his desire to try something new, we feel he’s gone too far in re-architecting Django projects.

James Beith's article: jamesbeith.co.uk/blog/how-to-structure-django-projects/

4.6 Summary

This chapter covered the art of Django app design. Specifically, each Django app should be tightly-focused on its own task and possess a simple, easy-to-remember name. If an app seems too complex, it should be broken up into smaller apps. Getting app design right takes practice and effort, but it’s well worth the effort.

We also covered alternative approaches to architecting apps and how logic is called within them.

5 | Settings and Requirements Files

Django 3 has over 150 settings that can be controlled in the settings module, most of which come with default values. Settings are loaded when your server starts up, and experienced Django developers stay away from trying to change settings in production since they require a server restart.

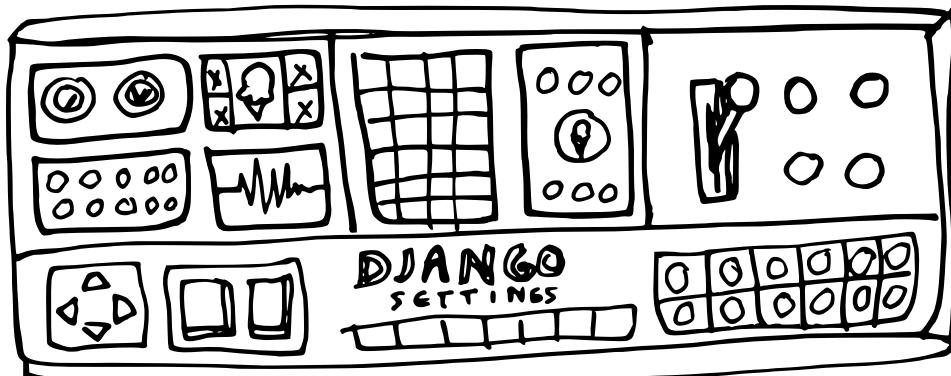


Figure 5.1: As your project grows, your Django settings can get pretty complex.

Some best practices we like to follow:

- **All settings files need to be version-controlled.** This is especially true in production environments, where dates, times, and explanations for settings changes absolutely must be tracked.
- **Don't Repeat Yourself.** You should inherit from a base settings file rather than cutting-and-pasting from one file to another.
- **Keep secret keys safe.** They should be kept out of version control.

5.1 Avoid Non-Versioned Local Settings

We used to advocate the non-versioned **local_settings anti-pattern**. Now we know better.

As developers, we have our own necessary settings for development, such as settings for debugging tools that should be disabled (and often not installed to) staging or production servers.

Furthermore, there are often good reasons to keep specific settings out of public or private code repositories. The `SECRET_KEY` setting is the first thing that comes to mind, but API key settings to services like Amazon, Stripe, and other password-type variables need to be protected.

WARNING: Protect Your Secrets!

The `SECRET_KEY` setting is used in Django's cryptographic signing functionality and needs to be set to a unique, unpredictable setting best kept out of version control. Running Django with a known `SECRET_KEY` defeats many of Django's security protections, which can lead to serious security vulnerabilities. For more details, read docs.djangoproject.com/en/3.2/topics/signing/.

The same warning for `SECRET_KEY` also applies to production database passwords, AWS keys, OAuth tokens, or any other sensitive data that your project needs in order to operate.

Later in this chapter, we'll show how to handle the `SECRET_KEY` issue in the "Keep Secret Keys Out With Environment Settings" section.

A common solution is to create `local_settings.py` modules that are created locally per server or development machine, and are purposefully kept out of version control. Developers now make development-specific settings changes, including the incorporation of business logic without the code being tracked in version control. Staging and deployment servers can have location-specific settings and logic without them being tracked in version control.

What could possibly go wrong?!?

Ahem...

- Every machine has untracked code.
- How much hair will you pull out, when after hours of failing to duplicate a production bug locally, you discover that the problem was custom logic in a production-only setting?
- How fast will you run from everyone when the 'bug' you discovered locally, fixed, and pushed to production was actually caused by customizations you made in your own `local_settings.py` module and is now crashing the site?

- Everyone copy/pastes the same `local_settings.py` module everywhere. Isn't this a violation of Don't Repeat Yourself but on a larger scale?

Let's take a different approach. Let's break up development, staging, test, and production settings into separate components that inherit from a common base object in a settings file tracked by version control. Plus, we'll make sure we do it in such a way that server secrets will remain secret.

Read on and see how it's done!

5.2 Using Multiple Settings Files

TIP: History of This Setup Pattern

The setup described here is based on the so-called “The One True Way”, from Jacob Kaplan-Moss’ The Best (and Worst) of Django talk at OSCON 2011. See slideshare.net/jacobian/the-best-and-worst-of-django.

Instead of having one `settings.py` file, with this setup you have a `settings/` directory containing your settings files. This directory will typically contain something like the following:

Example 5.1: Settings Directory

```
settings/
├── __init__.py
├── base.py
├── local.py
├── staging.py
├── test.py
└── production.py
```

WARNING: Requirements + Settings

Each settings module should have its own corresponding requirements file. We'll cover this at the end of this chapter in [Section 5.5: Using Multiple Requirements Files](#).

TIP: Multiple Files With Continuous Integration Servers

You'll also want to have a `ci.py` module containing that server's settings. Similarly, if it's a large project and you have other special-purpose servers, you might have

Settings file	Purpose
<i>base.py</i>	Settings common to all instances of the project.
<i>local.py</i>	This is the settings file that you use when you're working on the project locally. Local development-specific settings include DEBUG mode, log level, and activation of developer tools like django-debug-toolbar.
<i>staging.py</i>	Staging version for running a semi-private version of the site on a production server. This is where managers and clients should be looking before your work is moved to production.
<i>test.py</i>	Settings for running tests including test runners, in-memory database definitions, and log settings.
<i>production.py</i>	This is the settings file used by your live production server(s). That is, the server(s) that host the real live website. This file contains production-level settings only. It is sometimes called <i>prod.py</i> .

Table 5.1: Settings files and their purpose

custom settings files for each of them.

Let's take a look at how to use the shell and runserver management commands with this setup. You'll have to use the `--settings` command line option, so you'll be entering the following at the command-line.

To start the Python interactive interpreter with Django, using your *settings/local.py* settings file:

Example 5.2: Local Settings Shell

```
python manage.py shell --settings=config.settings.local
```

To run the local development server with your *settings/local.py* settings file:

Example 5.3: Local Settings Runserver

```
python manage.py runserver --settings=config.settings.local
```

TIP: DJANGO_SETTINGS_MODULE and PYTHONPATH

A great alternative to using the `--settings` command line option everywhere is to set the `DJANGO_SETTINGS_MODULE` and `PYTHONPATH` environment variable to your desired settings module path. To accomplish this, you'll need to set `DJANGO_SETTINGS_MODULE` to the corresponding settings module for each environment.

For those with a more comprehensive understanding of virtualenvwrapper, another alternative is to set `DJANGO_SETTINGS_MODULE` and `PYTHONPATH` in the `postactivate` script and unset them in the `postdeactivate` script. Then, once the virtualenv is activated, you can just type `python` from anywhere and import those values into your project. This also means that typing `django-admin` at the command-line works without the `--settings` option.

For the settings setup that we just described, here are the values to use with the `--settings` command line option or the `DJANGO_SETTINGS_MODULE` environment variable:

Environment	Option To Use With <code>--settings</code> (or <code>DJANGO_SETTINGS_MODULE</code> value)
Your local development server	<code>twoscoops.settings.local</code>
Your staging server	<code>twoscoops.settings.staging</code>
Your test server	<code>twoscoops.settings.test</code>
Your production server	<code>twoscoops.settings.production</code>

Table 5.2: Setting `DJANGO_SETTINGS_MODULE` per location

5.2.1 A Development Settings Example

As mentioned earlier, we need settings configured for development, such as selecting the console email backend, setting the project to run in DEBUG mode, and setting other configuration options that are used solely for development purposes. We place development settings like the following into `settings/local.py`:

Example 5.4: `settings/local.py`

```
from .base import *

DEBUG = True

EMAIL_BACKEND = 'django.core.mail.backends.console.EmailBackend'
```

```
DATABASES = {  
    'default': {  
        'ENGINE': 'django.db.backends.postgresql',  
        'NAME': 'twoscoops',  
        'HOST': 'localhost',  
    }  
}  
  
INSTALLED_APPS += ['debug_toolbar', ]
```

Now try it out at the command line with:

Example 5.5: runserver with local settings

```
python manage.py runserver --settings=config.settings.local
```

Open <http://127.0.0.1:8000> and enjoy your development settings, ready to go into version control! You and other developers will be sharing the same development settings files, which for shared projects, is awesome.

Yet there's another advantage: No more 'if DEBUG' or 'if not DEBUG' logic to copy/paste around between projects. Settings just got a whole lot simpler!

At this point we want to take a moment to note that Django settings files are the single, solitary place we advocate using `import *`. The reason is that *for the singular case of Django setting modules we want to override all the namespace*.

5.2.2 Multiple Development Settings

Sometimes we're working on a large project where different developers need different settings, and sharing the same `local.py` settings module with teammates won't do.

Well, it's still better tracking these settings in version control than relying on everyone customizing the same `local.py` module to their own tastes. A nice way to do this is with multiple dev settings files, e.g. `local_audrey.py` and `local_pydanny.py`:

Example 5.6: settings/local_pydanny.py

```
# settings/local_pydanny.py  
from .local import *
```

```
# Set short cache timeout
CACHE_TIMEOUT = 30
```

Why? It's not only good to keep all your own settings files in version control, but it's also good to be able to see your teammates' dev settings files. That way, you can tell if someone's missing a vital or helpful setting in their local development setup, and you can make sure that everyone's local settings files are synchronized. Here is what our projects frequently use for settings layout:

Example 5.7: Custom Settings

```
settings/
__init__.py
base.py
local_audreyr.py
local_pydanny.py
local.py
staging.py
test.py
production.py
```

5.3 Separate Configuration From Code

One of the causes of the local_settings anti-pattern is that putting SECRET_KEY, AWS keys, API keys, or server-specific values into settings files has problems:

- Config varies substantially across deploys, code does not.
- Secret keys are configuration values, not code.
- Secrets often should be just that: secret! Keeping them in version control means that everyone with repository access has access to them.
- Platforms-as-a-service usually don't give you the ability to edit code on individual servers. Even if they allow it, it's a terribly dangerous practice.

To resolve this, our answer is to use **environment variables** in a pattern we like to call, well, **The Environment Variables Pattern**.

Every operating system supported by Django (and Python) provides the easy capability to create environment variables.

Here are the benefits of using environment variables for secret keys:

- Keeping secrets out of settings allows you to store every settings file in version control without hesitation. All of your Python code really should be stored in version control, including your settings.
- Instead of each developer maintaining an easily-outdated, copy-and-pasted version of the `local_settings.py.example` file for their own development purposes, everyone shares the same version-controlled `settings/local.py`.
- System administrators can rapidly deploy the project without having to modify files containing Python code.
- Most platforms-as-a-service recommend the use of environment variables for configuration and have built-in features for setting and managing them.

TIP: 12 Factor App: Store Config in the Environment

If you've read the 12 Factor App's article on configuration you'll recognize this pattern. For reference, see 12factor.net/config. Some developers even advocate combining the use of environment variables with a single settings modules. We cover this practice in [Chapter 37: Appendix E: Settings Alternatives](#).

5.3.1 A Caution Before Using Environment Variables for Secrets

Before you begin setting environment variables, you should have the following:

- A way to manage the secret information you are going to store.
- A good understanding of how bash works with environment variables on servers, or a willingness to have your project hosted by a platform-as-a-service.

For more information, see en.wikipedia.org/wiki/Environment_variable.

WARNING: Environment Variables Do Not Work With Apache

If your target production environment uses Apache (outside of Elastic Beanstalk), then you will discover that setting operating system environment variables as described below doesn't work. Confusing the issue is that Apache has its own environment variable system, which is almost but not quite what you'll need.

If you are using Apache and want to avoid the local_settings anti-pattern, we recommend reading [Section 5.4: When You Can't Use Environment Variables](#) later in this chapter.

5.3.2 How to Set Environment Variables Locally

On pre-Catalina Mac and many Linux distributions that use **bash** for the shell, one can add lines like the following to the end of a *.bashrc*, *.bash_profile*, or *profile*. Macs on Catalina and afterwards use *.zshrc*. When dealing with multiple projects using the same API but with different keys, you can also place these at the end of your virtualenv's *bin/postactivate* script:

Example 5.8: Setting Environment Variables on Linux/OSX

```
export SOME_SECRET_KEY=1c3-cr3am-15-yummy
export AUDREY_FREEZER_KEY=y34h-r1ght-d0nt-t0uch-my-1c3-cr34m
```

On Windows systems, it's a bit trickier. You can set them one-by-one at the command line (**cmd.exe**) in a persistent way with the `setx` command, but you'll have to close and reopen your command prompt for them to go into effect. A better way is to place these commands at the end of the virtualenv's *bin/postactivate.bat* script so they are available upon activation:

Example 5.9: Setting Environment Variables on Windows

```
> setx SOME_SECRET_KEY 1c3-cr3am-15-yummy
```

PowerShell is much more powerful than the default Windows shell and comes with Windows Vista and above. Setting environment variables while using PowerShell:

For the current Windows user only:

Example 5.10: Setting Environment Variables on Powershell

```
[Environment]::SetEnvironmentVariable('SOME_SECRET_KEY',
                                      '1c3-cr3am-15-yummy', 'User')
[Environment]::SetEnvironmentVariable('AUDREY_FREEZER_KEY',
                                      'y34h-r1ght-d0nt-t0uch-my-1c3-cr34m', 'User')
```

Machine-wide:

Example 5.11: Globally Setting Environment Variables on Powershell

```
[Environment]::SetEnvironmentVariable('SOME_SECRET_KEY',
                                      '1c3-cr3am-15-yummy', 'Machine')
```

```
[Environment]::SetEnvironmentVariable('AUDREY_FREEZER_KEY',
'y34h-r1ght-d0nt-t0uch-my-1c3-cr34m', 'Machine')
```

For more information on Powershell, see <en.wikipedia.org/wiki/PowerShell>

TIP: virtualenvwrapper Makes This Easier

Mentioned earlier in this book, **virtualenvwrapper**, simplifies per-virtualenv environment variables. It's a great tool. However, setting it up requires a more-than-basic understanding of the shell and Mac, Linux, or Windows.

5.3.3 How to Unset Environment Variables Locally

When you set an environment variable via the commands listed above it will remain in existence within that terminal shell until it is unset or the shell is ended. This means that even if you deactivate a virtualenv, the environment variable remains. In our experience, this is fine 99% of the time. However, there are occasions when we want to tightly control environment variables. To do this, we execute the appropriate command for the operating system or shell variant:

Example 5.12: Unsetting Environment Variables on Linux/OSX/Windows

```
unset SOME_SECRET_KEY
unset AUDREY_FREEZER_KEY
```

Example 5.13: Unsetting Environment Variables on Powershell

```
[Environment]::UnsetEnvironmentVariable('SOME_SECRET_KEY', 'User')
[Environment]::UnsetEnvironmentVariable('AUDREY_FREEZER_KEY',
→ 'User')
```

If you are using virtualenvwrapper and want to unset environment variables whenever a virtualenv is deactivated, place these commands in the *postdeactivate* script.

5.3.4 How to Set Environment Variables in Production

If you're using your own servers, your exact practices will differ depending on the tools you're using and the complexity of your setup. For the simplest 1-server setup for test projects, you

can set the environment variables manually. But if you're using scripts or tools for automated server provisioning and deployment, your approach may be more complex. Check the documentation for your deployment tools for more information.

If your Django project is deployed via a platform-as-a-service (PaaS), such as Heroku, Python Anywhere, platform.sh, etc., check the documentation for specific instructions.

To see how you access environment variables from the Python side, open up a new Python prompt and type:

Example 5.14: Accessing Environment Variables in Python's REPL

```
>>> import os
>>> os.environ['SOME_SECRET_KEY']
'1c3-cr3am-15-yummy'
```

To access environment variables from one of your settings files, you can do something like this:

Example 5.15: Accessing Environment Variables in Python

```
# Top of settings/production.py
import os
SOME_SECRET_KEY = os.environ['SOME_SECRET_KEY']
```

This snippet simply gets the value of the `SOME_SECRET_KEY` environment variable from the operating system and saves it to a Python variable called `SOME_SECRET_KEY`.

Following this pattern means all code can remain in version control, and all secrets remain safe.

5.3.5 Handling Missing Secret Key Exceptions

In the above implementation, if the `SECRET_KEY` isn't available, it will throw a `KeyError`, making it impossible to start the project. That's great, but a `KeyError` doesn't tell you that much about what's actually wrong. Without a more helpful error message, this can be hard to debug, especially under the pressure of deploying to servers while users are waiting and your ice cream is melting.

Here's a useful code snippet that makes it easier to troubleshoot those missing environment variables. If you're using our recommended environment variable secrets approach, you'll want to add this to your `settings/base.py` file:

Example 5.16: The `get_env_variable()` Function

```
# settings/base.py
import os

# Normally you should not import ANYTHING from Django directly
# into your settings, but ImproperlyConfigured is an exception.
from django.core.exceptions import ImproperlyConfigured

def get_env_variable(var_name):
    """Get the environment variable or return exception."""
    try:
        return os.environ[var_name]
    except KeyError:
        error_msg = 'Set the {} environment' \
                   ' variable'.format(var_name)
        raise ImproperlyConfigured(error_msg)
```

Then, in any of your settings files, you can load secret keys from environment variables as follows:

Example 5.17: Using `get_env_variable()`

```
SOME_SECRET_KEY = get_env_variable('SOME_SECRET_KEY')
```

Now, if you don't have `SOME_SECRET_KEY` set as an environment variable, you get a traceback that ends with a useful error message like this:

Example 5.18: Error Generated by `get_env_variable()`

```
django.core.exceptions.ImproperlyConfigured: Set the
→ SOME_SECRET_KEY
environment variable.
```

WARNING: Don't Import Django Components Into Settings Modules

This can have many unpredictable side effects, so avoid any sort of import of Django components into your settings. `ImproperlyConfigured` is the exception because it's the official Django exception for...well...improperly configured projects. And just to be helpful we add the name of the problem setting to the error message.

PACKAGE TIP: Packages for Settings Management

A number of third-party packages take the idea of our `get_env_variable()` function and expand on it, including features like defaults and types and supporting `.env` files. The downside is the same you get with any complex packages: sometimes the edge cases cause problems. Nevertheless, most of them are quite useful and we've listed some of our favorites:

- github.com/joke2k/django-environ (Used in Cookiecutter Django)
- github.com/jazzband/django-configurations

TIP: Using `django-admin` Instead of `manage.py`

The official Django documentation says that you should use `django-admin` rather than `manage.py` when working with multiple settings files:

docs.djangoproject.com/en/3.2/ref/django-admin/

That being said, if you're struggling with getting `django-admin` to work, it's perfectly okay to develop and launch your site running it with `manage.py`.

5.4 When You Can't Use Environment Variables

The problem with using environment variables to store secrets is that it doesn't always work. The most common scenario for this is when using Apache for serving HTTP, but this also happens even in Nginx-based environments where operations wants to do things in a particular way. When this occurs, rather than going back to the **local_settings anti-pattern**, we advocate using non-executable files kept out of version control in a method we like to call the **secrets file pattern**.

To implement the **secrets file pattern**, follow these three steps:

- ① Create a secrets file using the configuration format of choice, be it JSON, .env, Config, YAML, or even XML.

- ② Add a secrets loader (JSON-powered example below) to manage the secrets in a cohesive, explicit manner.
- ③ Add the secrets file name to the project's `.gitignore` file.

5.4.1 Using JSON Files

Our preference is to use shallow JSON files. The JSON format has the advantage of being a format of choice for both Python and non-Python tools. To do this, first create a `secrets.json` file:

Example 5.19: secrets.json

```
{  
    "FILENAME": "secrets.json",  
    "SECRET_KEY": "I've got a secret!",  
    "DATABASES_HOST": "127.0.0.1",  
    "PORT": "5432"  
}
```

To use the `secrets.json` file, add the following code to your base settings module.

Example 5.20: The `get_settings()` Function

```
# settings/base.py  
import json  
  
# Normally you should not import ANYTHING from Django directly  
# into your settings, but ImproperlyConfigured is an exception.  
from django.core.exceptions import ImproperlyConfigured  
  
# JSON-based secrets module  
with open('secrets.json') as f:  
    secrets = json.load(f)  
  
def get_secret(setting, secrets=secrets):  
    '''Get the secret variable or return explicit exception.'''  
    try:  
        return secrets[setting]  
    except KeyError:  
        error_msg = 'Set the {0} environment  
                    variable'.format(setting)  
        raise ImproperlyConfigured(error_msg)
```

```
SECRET_KEY = get_secret('SECRET_KEY')
```

Now we are loading secrets from non-executable JSON files instead of from unversioned executable code. Hooray!

PACKAGE TIP: Zappa Provides Powerful Options

One of the reasons we prefer Zappa for deploying to AWS Lambda is the different and powerful options it provides for environment variable management. Definitely worth a look and something we want to see other tools and hosting platforms adopt.

Reference: github.com/Miserlou/Zappa#setting-environment-variables

5.4.2 Using .env, Config, YAML, and XML File Formats

While we prefer the forced simplicity of shallow JSON, others might prefer other file formats. We'll leave it up to the reader to create additional `get_secret()` alternatives that work with these formats. Just remember to be familiar with things like `yaml.safe_load()` and XML bombs. See [Section 28.10: Defend Against Python Code Injection Attacks](#).

5.5 Using Multiple Requirements Files

Finally, there's one more thing you need to know about multiple settings files setup. It's good practice for each settings file to have its own corresponding requirements file. This means we're only installing what is required on each server.

To follow this pattern, recommended to us by Jeff Triplett, first create a `requirements/` directory in the `<repository_root>`. Then create '`.txt`' files that match the contents of your settings directory. The results should look something like:

Example 5.21: Segmented Requirements

```
requirements/
├── base.txt
├── local.txt
├── staging.txt
└── production.txt
```

In the `base.txt` file, place the dependencies used in all environments. For example, you might have something like the following in there:

Example 5.22: requirements/base.txt

```
Django==3.2.0
psycopg2-binary==2.8.8
djangorestframework==3.11.0
```

Your *local.txt* file should have dependencies used for local development, such as:

Example 5.23: requirements/local.txt

```
-r base.txt # includes the base.txt requirements file

coverage==5.1
django-debug-toolbar==2.2
```

The needs of a continuous integration server might prompt the following for a *ci.txt* file:

Example 5.24: requirements/ci.txt

```
-r base.txt # includes the base.txt requirements file

coverage==5.1
```

Production installations should be close to what is used in other locations, so *production.txt* commonly just calls *base.txt*:

Example 5.25: requirements/production.txt

```
-r base.txt # includes the base.txt requirements file
```

5.5.1 Installing From Multiple Requirements Files

For local development:

Example 5.26: Installing Local Requirements

```
pip install -r requirements/local.txt
```

For production:

Example 5.27: Installing Production Requirements

```
pip install -r requirements/production.txt
```

TIP: Pin Requirements Exactly

All the pip requirements.txt examples in this chapter are explicitly set to a package version. This ensures a more stable project. We cover this at length in [Section 23.7.2: Step 2: Add Package and Version Number to Your Requirements](#).

TIP: Using Multiple Requirements Files With PaaS

We cover this in [Section 32.2.4: Multiple Requirements Files in Multiple Environments](#)

5.6 Handling File Paths in Settings

If you switch to the multiple settings setup and get new file path errors to things like templates and media, don't be alarmed. This section will help you resolve these errors.

We humbly beseech the reader to never hardcode file paths in Django settings files. This is *really* bad:

Example 5.28: Never Hardcode File Paths

```
# settings/base.py

# Configuring MEDIA_ROOT
# DON'T DO THIS! Hardcoded to just one user's preferences
MEDIA_ROOT = '/Users/pydanny/twoscoops_project/media'

# Configuring STATIC_ROOT
# DON'T DO THIS! Hardcoded to just one user's preferences
STATIC_ROOT = '/Users/pydanny/twoscoops_project/collected_static'

# Configuring STATICFILES_DIRS
# DON'T DO THIS! Hardcoded to just one user's preferences
STATICFILES_DIRS = ['/Users/pydanny/twoscoops_project/static']

# Configuring TEMPLATES
# DON'T DO THIS! Hardcoded to just one user's preferences
```

```
TEMPLATES = [
{
    'BACKEND':
        'django.template.backends.django.DjangoTemplates',
    'DIRS': ['/Users/pydanny/twoscoops_project/templates'],
},
]
```

The above code represents a common pitfall called **hardcoding**. The above code, called a **fixed path**, is bad because as far as you know, **pydanny** (Daniel Roy Greenfeld) is the only person who has set up their computer to match this path structure. Anyone else trying to use this example will see their project break, forcing them to either change their directory structure (unlikely) or change the settings module to match their preference (causing problems for everyone else including pydanny).

Don't hardcode your paths!

To fix the path issue, we dynamically set a project root variable intuitively named **BASE_DIR** at the top of the base settings module. Since **BASE_DIR** is determined in relation to the location of **base.py**, your project can be run from any location on any development computer or server.

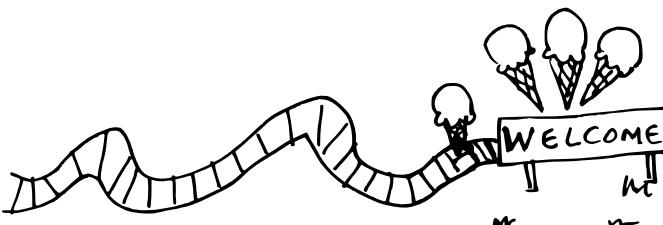


Figure 5.2: While we're at it, let's go down this path.

We find the cleanest way to set a **BASE_DIR**-like setting is with **Pathlib**, part of Python since 3.4 that does elegant, clean path calculations:

Example 5.29: Using Pathlib to discover project root

```
# At the top of settings/base.py
from pathlib import Path

BASE_DIR = Path(__file__).resolve().parent.parent.parent
```

```

MEDIA_ROOT = BASE_DIR / 'media'
STATIC_ROOT = BASE_DIR / 'static_root'
STATICFILES_DIRS = [BASE_DIR / 'static']
TEMPLATES = [
{
    'BACKEND':
        → 'django.template.backends.djangoproject.DjangoTemplates',
    'DIRS': [BASE_DIR / 'templates']
},
]

```

If you really want to set your `BASE_DIR` with the Python standard library's `os.path` library, though, this is one way to do it in a way that will account for paths:

Example 5.30: Using `os.path` to discover project root

```

# At the top of settings/base.py
from os.path import abspath, dirname, join

def root(*dirs):
    base_dir = join(dirname(__file__), '..', '..')
    return abspath(join(base_dir, *dirs))

BASE_DIR = root()
MEDIA_ROOT = root('media')
STATIC_ROOT = root('static_root')
STATICFILES_DIRS = [root('static')]
TEMPLATES = [
{
    'BACKEND':
        → 'django.template.backends.djangoproject.DjangoTemplates',
    'DIRS': [root('templates')],
},
]

```

With your various path settings dependent on `BASE_DIR`, your file path settings should work, which means your templates and media should be loading without error.

TIP: How Different Are Your Settings From the Django Defaults?

If you want to know how things in your project differ from Django's defaults, use the `diffsettings` management command.

5.7 Summary

Remember, everything except for passwords and API keys ought to be tracked in version control.

Any project that's destined for a real live production server is bound to need multiple settings and requirements files. Even beginners to Django need this kind of settings/requirements file setup once their projects are ready to leave the original development machine. We provide our solution, as well as an Apache-friendly solution since it works well for both beginning and advanced developers.

Also, if you prefer a different shell than the ones provided, environment variables still work. You'll just need to know the syntax for defining them.

The same thing applies to requirements files. Working with untracked dependency differences increases risk as much as untracked settings.

6 | Model Best Practices

Models are the foundation of most Django projects. Racing to write Django models without thinking things through can lead to problems down the road.

All too frequently we developers rush into adding or modifying models without considering the ramifications of what we are doing. The quick fix or sloppy “temporary” design decision that we toss into our codebase now can hurt us in the months or years to come, forcing crazy workarounds or corrupting existing data.

So keep this in mind when adding new models in Django or modifying existing ones. Take your time to think things through, and design your foundation to be as strong and sound as possible.

PACKAGE TIP: Our Picks for Working With Models

Here's a quick list of the model-related Django packages that we use in practically every project.

- **django-model-utils** to handle common patterns like **TimeStampedModel**.
- **django-extensions** has a powerful management command called **shell_plus** which autoloads the model classes for all installed apps. The downside of this library is that it includes a lot of other functionality which breaks from our preference for small, focused apps.

6.1 Basics

6.1.1 Break Up Apps With Too Many Models

If there are 20+ models in a single app, think about ways to break it down into smaller apps, as it probably means your app is doing too much. In practice, we like to lower this number to no more than five to ten models per app.

6.1.2 Be Careful With Model Inheritance

Model inheritance in Django is a tricky subject. Django provides three ways to do model inheritance: **abstract base classes**, **multi-table inheritance**, and **proxy models**.

WARNING: Django Abstract Base Classes < Python Abstract Base Classes

Don't confuse Django abstract base classes with the abstract base classes in the Python standard library's abc module, as they have very different purposes and behaviors.

Here are the pros and cons of the three model inheritance styles. To give a complete comparison, we also include the option of using no model inheritance to begin with:

Model Inheritance Style	Pros	Cons
No model inheritance: if models have a common field, give both models that field.	Makes it easiest to understand at a glance how Django models map to database tables.	If there are a lot of fields duplicated across models, this can be hard to maintain.
Abstract base classes: tables are only created for derived models.	Having the common fields in an abstract parent class saves us from typing them more than once. We don't get the overhead of extra tables and joins that are incurred from multi-table inheritance.	We cannot use the parent class in isolation.
Multi-table inheritance: tables are created for both parent and child. An implied <code>OneToOneField</code> links parent and child.	Gives each model its own table, so that we can query either parent or child model. It also gives us the ability to get to a child object from a parent object: <code>parent.child</code>	Adds substantial overhead since each query on a child table requires joins with all parent tables. We strongly recommend against using multi-table inheritance. See the warning below.
Proxy models: a table is only created for the original model.	Allows us to have an alias of a model with different Python behavior.	We cannot change the model's fields.

Table 6.1: Pros and Cons of the Model Inheritance Styles

WARNING: Avoid Multi-Table Inheritance

Multi-table inheritance, sometimes called “concrete inheritance,” is considered by the authors and many other developers to be a bad thing. We strongly recommend against using it. We’ll go into more detail about this shortly.

Here are some simple rules of thumb for knowing which type of inheritance to use and when:

- If the overlap between models is minimal (e.g. you only have a couple of models that share one or two identically named fields), there might not be a need for model inheritance. Just add the fields to both models.
- If there is enough overlap between models that maintenance of models’ repeated fields cause confusion and inadvertent mistakes, then in most cases the code should be refactored so that the common fields are in an abstract base model.
- Proxy models are an occasionally-useful convenience feature, but they’re very different from the other two model inheritance styles.
- At all costs, everyone should avoid multi-table inheritance (see warning above) since it adds both confusion and substantial overhead. Instead of multi-table inheritance, use explicit `OneToOneFields` and `ForeignKeys` between models so you can control when joins are traversed. In our combined 20+ years of doing Django we’ve never seen multi-table inheritance cause anything but trouble.

6.1.3 Model Inheritance in Practice: The TimeStampedModel

It’s very common in Django projects to include a `created` and `modified` timestamp field on all your models. We could manually add those fields to each and every model, but that’s a lot of work and adds the risk of human error. A better solution is to write a `TimeStampedModel` to do the work for us:

Example 6.1: core/models.py

```
from django.db import models

class TimeStampedModel(models.Model):
    """
    An abstract base class model that provides self-
    updating ``created`` and ``modified`` fields.
    """
    created = models.DateTimeField(auto_now_add=True)
```

```
modified = models.DateTimeField(auto_now=True)

class Meta:
    abstract = True
```

Take careful note of the very last two lines in the example, which turn our example into an abstract base class:

Example 6.2: Defining an abstract base class

```
class Meta:
    abstract = True
```

By defining `TimeStampedModel` as an abstract base class when we define a new class that inherits from it, Django doesn't create a `core_timestampedmodel` table when `migrate` is run.

Let's put it to the test:

Example 6.3: flavors/models.py

```
# flavors/models.py
from django.db import models

from core.models import TimeStampedModel

class Flavor(TimeStampedModel):
    title = models.CharField(max_length=200)
```

This only creates one table: the `flavors_flavor` database table. That's exactly the behavior we wanted.

On the other hand, if `TimeStampedModel` was not an abstract base class (i.e. a concrete base class via multi-table inheritance), it would also create a `core_timestampedmodel` table. Not only that, but all of its subclasses including `Flavor` would lack the fields and have implicit foreign keys back to `TimeStampedModel` just to handle created/modified timestamps. Any reference to `Flavor` that reads or writes to the `TimeStampedModel` would impact two tables. (Thank goodness it's abstract!)

Remember, concrete inheritance has the potential to become a nasty performance bottleneck. This is even more true when you subclass a concrete model class multiple times.

Further reading:

- docs.djangoproject.com/en/3.2/topics/db/models/#model-inheritance

6.2 Database Migrations

Django comes with a powerful database change propagation library aptly called “**migrations**”, or as we prefer to refer to it in the book, `django.db.migrations`.

6.2.1 Tips for Creating Migrations

- As soon as a new app or model is created, take that extra minute to create the initial `django.db.migrations` for that new model. All we do is type `python manage.py makemigrations`.
- Examine the generated migration code before you run it, especially when complex changes are involved. Also, review the `SQL` that will be used with the `sqlmigrate` command.
- Use the `MIGRATION_MODULES` setting to manage writing migrations for third-party apps that don’t have their own `django.db.migrations`-style migrations.
- Don’t worry about how many migrations are created. If the number of migrations becomes unwieldy, use `squashmigrations` to bring them to heel.
- Always back up your data before running a migration.

6.2.2 Adding Python Functions and Custom SQL to Migrations

`django.db.migrations` can’t anticipate complex changes to your data, or to external components that interact with your data. That’s when it’s useful to delve into writing python or custom `SQL` to aid in running migrations. At some point in any project that hits production, you’ll find a reason to use either the `RunPython` or `RunSQL` classes:

- docs.djangoproject.com/en/3.2/ref/migration-operations/#runpython
- docs.djangoproject.com/en/3.2/ref/migration-operations/#runsql

For what it’s worth, our preference is to use `RunPython` before `RunSQL`, but we advise sticking to where your strengths are.

6.3 Overcoming Common Obstacles of RunPython

When we write RunPython-called functions, we encounter a few pain points. Most, but not all of these can be resolved.

6.3.1 Getting Access to a Custom Model Manager's Methods

Sometimes you want to be able to filter, exclude, create, or modify records by using custom model manager methods. However, by default `django.db.migrations` excludes these components. Fortunately, we can override this behavior by adding a `use_in_migrations = True` flag to our custom managers.

See: docs.djangoproject.com/en/3.2/topics/migrations/#model-managers

6.3.2 Getting Access to a Custom Model Method

Due to how `django.db.migrations` serializes models, there's no way around this limitation. You simply cannot call any custom methods during a migration. See the reference link below:

docs.djangoproject.com/en/3.2/topics/migrations/#historical-models

WARNING: Watch Out for Custom Save and Delete Methods

If you override a model's save and delete methods, they won't be called when called by RunPython. Consider yourself warned, this can be a devastating gotcha.

6.3.3 Use RunPython.noop to Do Nothing

In order for reverse migrations to work, RunPython must be given a `reverse_code` callable to undo the effects of the code callable. However, some of the code callables that we write are idempotent. For example, they combine existing data into a newly added field. Writing a `reverse_code` callable for these functions is either impossible or pointless. When this happens, use `RunPython.noop` as the `reverse_code`.

For example, let's say we create a new model called "Cone". All existing scoops need their own cone, so we write an `add_cones` function to add the cones to the database. However, when reversing the migration, writing code to remove the cones is pointless; `migrations.CreateModel.database_backwards` will delete the `cone.cone` table and all its records for us. Therefore, we should use `RunPython.noop` for the `reverse_code`:

Example 6.4: RunPython Reversal with RunPython.noop

```

from django.db import migrations, models

def add_cones(apps, schema_editor):
    Scoop = apps.get_model('scoop', 'Scoop')
    Cone = apps.get_model('cone', 'Cone')

    for scoop in Scoop.objects.all():
        Cone.objects.create(
            scoop=scoop,
            style='sugar'
        )

class Migration(migrations.Migration):

    initial = True

    dependencies = [
        ('scoop', '0051_auto_20670724'),
    ]

    operations = [
        migrations.CreateModel(
            name='Cone',
            fields=[
                ('id', models.AutoField(auto_created=True,
                                       primary_key=True,
                                       serialize=False,
                                       verbose_name='ID')),
                ('style', models.CharField(max_length=10),
                 choices=[('sugar', 'Sugar'), ('waffle',
                                               'Waffle')]),
                ('scoop', models.OneToOneField(null=True,
                                              to='scoop.Scoop',
                                              on_delete=django.db.models.deletion.SET_NULL,
                                              )),
            ],
        ),
        # RunPython.noop does nothing but allows reverse migrations
        # to occur
        migrations.RunPython(add_cones, migrations.RunPython.noop)
    ]

```

6.3.4 Deployment and Management of Migrations

- It goes without saying, but we'll say it anyway: Always back up your data before running a migration.
- Before deployment, check that you can rollback migrations! We can't always have perfect round-trips, but not being able to roll back to an earlier state really hurts bug tracking and sometimes deployment in larger projects.
- If a project has tables with millions of rows in them, do extensive tests against data of that size on staging servers before running a migration on a production server. Migrations on real data can take much, much, much more time than anticipated.
- If you are using MySQL:
 - You absolutely positively must back up the database before any schema change. MySQL lacks transaction support around schema changes, hence rollbacks are impossible.
 - If you can, put the project in read-only mode before executing the change.
 - If not careful, schema changes on heavily populated tables can take a long time. Not seconds or minutes, but hours.

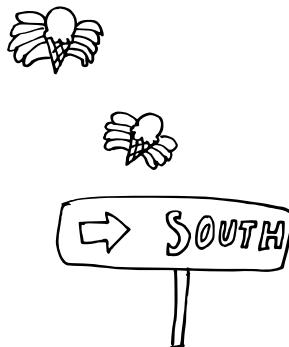


Figure 6.1: Cones migrating south for the winter. Django's built-in migration system started out as an external project called South.

TIP: Always Put Data Migration Code Into Source Control

Including migration code in VCS is an absolute necessity. Not including migration code in version control is just like not including settings files in VCS: You might be able to develop, but should you switch machines or bring someone else into the project, then everything will break.

6.4 Django Model Design

One of the most difficult topics that receive the least amount of attention is how to design good Django models.

How do you design for performance without optimizing prematurely? Let's explore some strategies here.

6.4.1 Start Normalized

We suggest that readers of this book need to be familiar with **database normalization**. If you are unfamiliar with database normalization, make it your responsibility to gain an understanding, as working with models in Django effectively requires a working knowledge of this. Since a detailed explanation of the subject is outside the scope of this book, we recommend the following resources:

- ▶ en.wikipedia.org/wiki/Database_normalization
- ▶ en.wikibooks.org/wiki/Relational_Database_Design/Normalization

When you're designing your Django models, always start off normalized. Take the time to make sure that no model should contain data already stored in another model.

At this stage, use relationship fields liberally. Don't denormalize prematurely. You want to have a good sense of the shape of your data.

6.4.2 Cache Before Denormalizing

Often, setting up caching in the right places can save you the trouble of denormalizing your models. We'll cover caching in much more detail in [Chapter 26: Finding and Reducing Bottlenecks](#), so don't worry too much about this right now.

6.4.3 Denormalize Only if Absolutely Needed

It can be tempting, especially for those new to the concepts of data normalization, to denormalize prematurely. Don't do it! Denormalization may seem like a panacea for what causes problems in a project. However, it's a tricky process that risks adding complexity to your project and dramatically raises the risk of losing data.

Please, please, please explore caching before denormalization.

When a project has reached the limits of what the techniques described in [Chapter 26: Finding and Reducing Bottlenecks](#) can address, that's when research into the concepts and patterns of database denormalization should begin.

6.4.4 When to Use Null and Blank

When defining a model field, you have the ability to set the `null=True` and the `blank=True` options. By default, they are `False`.

Knowing when to use these options is a common source of confusion for developers.

We've put table [Table 6.2: When to Use Null and Blank by Field](#) together to serve as a guide for standard usage of these model field arguments.

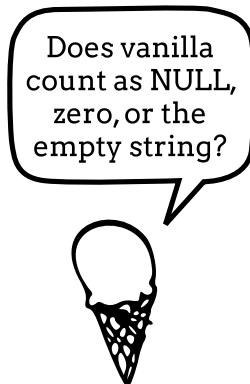


Figure 6.2: A common source of confusion.

6.4.5 When to Use BinaryField

This field allows for the storage of raw binary data or `bytes`. We can't perform filters, excludes, or other `SQL` actions on the field, but there are use cases for it. For example, we could store:

- MessagePack-formatted content.
- Raw sensor data.
- Compressed data e.g. the type of data Sentry stores as a BLOB, but is required to base64-encode due to legacy issues.

The possibilities are endless, but remember that binary data can come in huge chunks, which can slow down databases. If this occurs and becomes a bottleneck, the solution might be to save the binary data in a file and reference it with a `FileField`.

WARNING: Don't Serve Files From BinaryField!

Storing files in a database field should never happen. If it's being considered as a solution to a problem, find a certified database expert and ask for a second opinion.

To summarize PostgreSQL expert Frank Wiles on the problems with using a database as a file store:

- 'read/write to a DB is always slower than a filesystem'

Field Type	Setting null=True	Setting blank=True
CharField, TextField, SlugField, EmailField, CommaSeparatedIntegerField, UUIDField	<i>Okay</i> if you also have set both unique=True and blank=True. In this situation, null=True is required to avoid unique constraint violations when saving multiple objects with blank values.	<i>Okay</i> if you want the corresponding form widget to accept empty values. If you set this, empty values are stored as NULL in the database if null=True and unique=True are also set. Otherwise, they get stored as empty strings.
FileField, ImageField	<i>Don't do this.</i> Django stores the path from MEDIA_ROOT to the file or to the image in a CharField, so the same pattern applies to FileFields.	<i>Okay.</i> The same pattern for CharField applies here.
BooleanField	<i>Okay.</i>	Default is blank=True.
IntegerField, FloatField, DecimalField, DurationField, etc	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want the corresponding form widget to accept empty values. If so, you will also want to set null=True.
DateTimeField, DateField, TimeField, etc.	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want the corresponding form widget to accept empty values, or if you are using auto_now or auto_now_add. If it's the former, you will also want to set null=True.
ForeignKey, OneToOneField	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want the corresponding form widget (e.g. the select box) to accept empty values. If so, you will also want to set null=True.
ManyToManyField	Null has no effect	<i>Okay</i> if you want the corresponding form widget (e.g. the select box) to accept empty values.
GenericIPAddressField	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want to make the corresponding field widget accept empty values. If so, you will also want to set null=True.
JSONField	<i>Okay.</i>	<i>Okay.</i>

Table 6.2: When to Use Null and Blank by Field

- ‘your DB backups grow to be huge and more time consuming’
- ‘access to the files now requires going through your app (Django) and DB layers’

See revsys.com/blog/2012/may/01/three-things-you-should-never-put-your-database/

When someone thinks there is a good use case for serving files from a database and quotes a success like npmjs.org (stored files in CouchDB), it’s time to do your research. The truth is that npmjs.org, migrated its database-as-file-store system to a more traditional file serving method years ago.

6.4.6 Try to Avoid Using Generic Relations

In general we advocate against **generic relations** and use of `models.field.GenericForeignKey`. They are usually more trouble than they are worth. Using them is often a sign that troublesome shortcuts are being taken, that the wrong solution is being explored.

The idea of generic relations is that we are binding one table to another by way of an unconstrained foreign key (`GenericForeignKey`). Using it is akin to using a NoSQL datastore that lacks foreign key constraints as the basis for projects that could really use foreign key constraints. This causes the following:

- Reduction in speed of queries due to lack of indexing between models.
- Danger of data corruption as a table can refer to another against a non-existent record.

The upside of this lack of constraints is that generic relations make it easier to build apps for things that need to interact with numerous model types we might have created. Specifically things like favorites, ratings, voting, messages, and tagging apps. Indeed, there are a number of existing apps that are built this way. While we hesitate to use them, we are comforted by the fact that the good ones are focused on a single task (for example, tagging).

Over time, we’ve found that we can build favorites, ratings, voting, messages, and tagging apps built off `ForeignKey` and `ManyToMany` field. For a little more development work, by avoiding the use of `GenericForeignKey` we get the benefit of speed and integrity.

Where the `GenericForeignKey` becomes really troublesome is when its unconstrained feature becomes the method by which a project’s primary data is defined. For example, if we built an Ice Cream themed project where the relationships between toppings, flavors,

containers, orders, and sales were all tracked via `GenericForeignKey`, we would have the problems described in the bullets above. In short:

- Try to avoid generic relations and `GenericForeignKey`.
- If you think you need generic relations, see if the problem can be solved through better model design or the new PostgreSQL fields.
- If usage can't be avoided, try to use an existing third-party app. The isolation a third-party app provides will help keep data cleaner.

For another view that shares our opinion, please read lukeplant.me.uk/blog/posts/avoid-django-genericforeignkey

6.4.7 Make Choices and Sub-Choices Model Constants

A nice pattern is to add choices as properties to a model as a structure defined with tuples. As these are constants tied to your model (and the represented data) being able to easily access them everywhere makes development easier.

This technique is described in docs.djangoproject.com/en/3.2/ref/models/fields/#django.db.models.Field.choices. If we translate that to an ice cream-based example, we get:

Example 6.5: Setting Choice Model Attributes

```
# orders/models.py
from django.db import models

class IceCreamOrder(models.Model):
    FLAVOR_CHOCOLATE = 'ch'
    FLAVOR_VANILLA = 'vn'
    FLAVOR_STRAWBERRY = 'st'
    FLAVOR_CHUNKY_MUNKY = 'cm'

    FLAVOR_CHOICES = (
        (FLAVOR_CHOCOLATE, 'Chocolate'),
        (FLAVOR_VANILLA, 'Vanilla'),
        (FLAVOR_STRAWBERRY, 'Strawberry'),
        (FLAVOR_CHUNKY_MUNKY, 'Chunky Munk')
    )

    flavor = models.CharField(
        max_length=2,
```

```
    choices=FLAVOR_CHOICES  
)
```

Using this model, we can do the following:

Example 6.6: Accessing Choice Model Attributes

```
>>> from orders.models import IceCreamOrder  
>>>  
-> IceCreamOrder.objects.filter(flavor=IceCreamOrder.FLAVOR_CHOCOLATE)  
[<icecreamorder: 35>, <icecreamorder: 42>, <icecreamorder: 49>]
```

This works in both Python code and templates, and the attribute can be accessed on either the class or the instantiated model object.

6.4.8 Using Enumeration Types for Choices

Nate Cox recommends using Django's enumeration types for choices. Built into Django as of the release of 3.0, it's even easier to use.

Example 6.7: Setting Choice Model Attributes

```
from django.db import models  
  
class IceCreamOrder(models.Model):  
    class Flavors(models.TextChoices):  
        CHOCOLATE = 'ch', 'Chocolate'  
        VANILLA = 'vn', 'Vanilla'  
        STRAWBERRY = 'st', 'Strawberry'  
        CHUNKY_MUNKY = 'cm', 'Chunky Munky'  
  
        flavor = models.CharField(  
            max_length=2,  
            choices=Flavors.choices  
)
```

Using this code we're able to do:

Example 6.8: Accessing Enum-Based Choice Model Attributes

```
>>> from orders.models import IceCreamOrder
>>>
→ IceCreamOrder.objects.filter(flavor=IceCreamOrder.Flavors.CHOCOLATE)
[<icecreamorder: 35>, <icecreamorder: 42>, <icecreamorder: 49>]
```

There are a few drawbacks to using enumeration types over the previous method. Specifically:

- Named groups are not possible with enumeration types. What this means is that if we want to have categories inside our choices, we'll have to use the older tuple-based approach.
- If we want other types besides `str` and `int`, we have to define those ourselves.

Enumeration types for choice fields provide a lovely API. We've found an excellent approach to using them is to stick with them until we run into the drawbacks listed above. Then we switch to the older tuple-based method.

6.4.9 PostgreSQL-Specific Fields: When to Use Null and Blank

Field Type	Setting null=True	Setting blank=True
<code>ArrayField</code>	<i>Okay.</i>	<i>Okay.</i>
<code>HStoreField</code>	<i>Okay.</i>	<i>Okay.</i>
<code>IntegerField</code> , <code>BigIntegerField</code> , and <code>FloatRangeField</code>	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want the corresponding form widget to accept empty values. If so, you will also want to set <code>null=True</code> .
<code>DatetimeRangeField</code> and <code>DateRangeField</code>	<i>Okay</i> if you want to be able to set the value to NULL in the database.	<i>Okay</i> if you want the corresponding form widget to accept empty values, or if you are using <code>auto_now</code> or <code>auto_now_add</code> . If so, you will also want to set <code>null=True</code> .

Table 6.3: When to Use Null and Blank for Postgres Fields

6.5 The Model _meta API

This `_meta` API is unusual in the following respects:

- It is prefixed with “`_`” yet is a public, documented API.

- Unlike other `_meta` components of Django, `_meta` follows the same deprecation patterns as the rest of the framework.

The reason for this is that before Django 1.8, the `model._meta` API was unofficial and purposely undocumented, as is normal with any API subject to change without notice. The original purpose of `_meta` was simply for Django to store extra info about models for its own use. However, it proved so useful that it is now a documented API.

For most projects, you shouldn't need `_meta`. The main uses for it are when you need to:

- Get a list of a model's fields.
- Get the class of a particular field for a model (or its inheritance chain or other info derived from such).
- Ensure that how you get this information remains constant across future Django versions.

Examples of these sorts of situations:

- Building a Django model introspection tool.
- Building your own custom specialized Django form library.
- Creating admin-like tools to edit or interact with Django model data.
- Writing visualization or analysis libraries, e.g. analyzing info only about fields that start with "foo".

Further reading:

- Model `_meta` docs: docs.djangoproject.com/en/3.2/ref/models/meta/

6.6 Model Managers

Every time we use the Django ORM to query a model, we are using an interface called a **model manager** to interact with the database. Model managers are said to act on the full set of all possible instances of this model class (all the data in the table) to restrict the ones you want to work with. Django provides a default model manager for each model class, but we can define our own.

Here's a simple example of a custom model manager:

Example 6.9: Custom Model Manager: published

```
from django.db import models
from django.utils import timezone
```

```

class PublishedManager(models.Manager):

    def published(self, **kwargs):
        return self.filter(pub_date__lte=timezone.now(), **kwargs)

class FlavorReview(models.Model):
    review = models.CharField(max_length=255)
    pub_date = models.DateTimeField()

    # add our custom model manager
    objects = PublishedManager()

```

Now, if we first want to display a count of all of the ice cream flavor reviews, and then a count of just the published ones, we can do the following:

Example 6.10: Custom Model Manager: published

```

>>> from reviews.models import FlavorReview
>>> FlavorReview.objects.count()
35
>>> FlavorReview.objects.published().count()
31

```

Easy, right? Yet wouldn't it make more sense if you just added a second model manager? That way you could have something like:

Example 6.11: Illusory Benefits of Using Two Model Managers

```

>>> from reviews.models import FlavorReview
>>> FlavorReview.objects.filter().count()
35
>>> FlavorReview.published.filter().count()
31

```

On the surface, replacing the default model manager seems like the intelligent thing to do. Unfortunately, our experiences in real project development make us very careful when we use this method. Why?

First, when using model inheritance, children of abstract base classes receive their parent's model manager, and children of concrete base classes do not.

Second, the first manager applied to a model class is the one that Django treats as the default. This breaks significantly with the normal Python pattern, causing what can appear to be unpredictable results from QuerySets.

With this knowledge in mind, in your model class, `objects = models.Manager()` should be defined manually above any custom model manager.

WARNING: Know the Model Manager Order of Operations

Always set `objects = models.Manager()` above any custom model manager that has a new name. While this rule can be broken, it's an advanced technique that we don't recommend for most projects.

Additional reading: docs.djangoproject.com/en/3.2/topics/db/managers/

6.7 Understanding Fat Models

The concept of **fat models** is that rather than putting data-related code in views and templates, instead, we encapsulate the logic in model methods, classmethods, properties, even manager methods. That way, any view or task can use the same logic. For example, if we have a model that represents Ice Cream reviews we might attach to it the following methods:

- ▶ `Review.create_review(cls, user, rating, title, description)` A classmethod for creating reviews. Called on the model class itself from HTML and REST views, as well as an import tool that accepts spreadsheets.
- ▶ `Review.product_average` A review instance property that returns the reviewed product's average rating. Used on review detail views so the reader can get a feel for the overall opinion without leaving the page.
- ▶ `Review.found_useful(self, user, yes)` A method that sets whether or not readers found the review useful or not. Used in detail and list views, for both HTML and REST implementations.

As can be inferred from this list, fat models are a great way to improve the reuse of code across a project. In fact, the practice of moving logic from views and templates to models has been growing across projects, frameworks, and languages for years. This is a good thing, right?

Not necessarily.

The problem with putting all logic into models is it can cause models to explode in size of code, becoming what is called a '**god object**'. This anti-pattern results in model classes that

are hundreds, thousands, even tens of thousands of lines of code. Because of their size and complexity, god objects are hard to understand, hence hard to test and maintain.

When moving logic into models, we try to remember one of the basic ideas of object-oriented programming, that big problems are easier to resolve when broken up into smaller problems. If a model starts to become unwieldy in size, we begin isolating code that is prime for reuse across other models, or whose complexity requires better management. The methods, classmethods, and properties are kept, but the logic they contain is moved into *Model Behaviors* or *Stateless Helper Functions*. Let's cover both techniques in the following subsections:

6.7.1 Model Behaviors a.k.a Mixins

Model behaviors embrace the idea of composition and encapsulation via the use of mixins. Models inherit logic from abstract models. For more information, see the following resources:

- ▶ blog.kevinastone.com/django-model-behaviors.html Kevin Stone's article on using composition to reduce replication of code.
- ▶ [Section 10.2: Using Mixins With CBVs](#).

6.7.2 Stateless Helper Functions

By moving logic out of models and into utility functions, it becomes more isolated. This isolation makes it easier to write tests for the logic. The downside is that the functions are stateless, hence all arguments have to be passed.

We cover this in [Chapter 31: What About Those Random Utilities?](#)

6.7.3 Model Behaviors vs Helper Functions

In our opinion, alone neither of these techniques is perfect. However, when both are used judiciously, they can make projects shine. Understanding when to use either isn't a static science, it is an evolving process. This kind of evolution is tricky, prompting our suggestion to have tests for the components of fat models.

6.8 Additional Resources

Here are a number of articles that build on what we illustrate in this chapter:

- ▶ hakibenita.com/bullet-proofing-django-models - Haki Benita's excellent article on implementing very serious rules to Django models. His entire blog is full of excellent information.

- - Andrew Brooks' deep dive into Django's ORM is worth the read for anyone concerned about the performance of their model design. spellbookpress.com/books/temple-of-django-database-performance/

6.9 Summary

Models are the foundation for most Django projects, so take the time to design them thoughtfully.

Start normalized, and only denormalize if you've already explored other options thoroughly. You may be able to simplify slow, complex queries by dropping down to raw SQL, or you may be able to address your performance issues with caching in the right places.

If you decide to use model inheritance, inherit from abstract base classes rather than concrete models. You'll save yourself from the confusion of dealing with implicit, unneeded joins.

Watch out for the “gotchas” when using the `null=True` and `blank=True` model field options. Refer to our handy table for guidance.

You may find `django-model-utils` and `django-extensions` pretty handy.

Finally, fat models are a way to encapsulate logic in models, but can all too readily turn into god objects.

Our next chapter is where we begin talking about queries and the database layer.

7 | Queries and the Database Layer

Most of the queries we write are simple. Django's **Object-Relational Model** or **ORM** provides a great productivity shortcut: not only generating decent SQL queries for common use cases, but providing model access/update functionality that comes complete with validation and security. It allows us to trivially write code that works with different database engines. This feature of ORMs powers much of the Django third-party package ecosystem. If you can write your query easily with the ORM, then take advantage of it!

The Django ORM, like any ORM, converts data from different types into objects that we can use pretty consistently across supported databases. Then it provides a set of methods for interacting with those objects. For the most part, Django does a pretty good job at what it's designed to do. However, it does have quirks, and understanding those quirks is part of learning how to use Django. Let's go over some of them, shall we?

7.1 Use `get_object_or_404()` for Single Objects

In views such as detail pages where you want to retrieve a single object and do something with it, use `get_object_or_404()` instead of `get()`.

WARNING: `get_object_or_404()` Is for Views Only

- Only use it in views.
- Don't use it in helper functions, forms, model methods or anything that is not a view or directly view related.

Many years ago a certain Python coder and author named Daniel was deploying his first Django project. So entranced was he by Django's `get_object_or_404()` function that he used it everywhere, in views, in models, in forms, everywhere. In development this worked great and passed tests. Unfortunately, this unconstrained use meant that when certain records were deleted by the admin staff, the entire site broke.

Keep `get_object_or_404()` in your views!

7.2 Be Careful With Queries That Might Throw Exceptions

When you're getting a single Django model instance with the `get_object_or_404()` shortcut, you don't need to wrap it in a `try-except` block. That's because `get_object_or_404()` already does that for you.

However, in most other situations you need to use a `try-except` block. Some tips:

7.2.1 ObjectDoesNotExist vs. DoesNotExist

`ObjectDoesNotExist` can be applied to any model object, whereas `DoesNotExist` is for a specific model.

Example 7.1: Example Use for `ObjectDoesNotExist`

```
from django.core.exceptions import ObjectDoesNotExist

from flavors.models import Flavor
from store.exceptions import OutOfStock

def list_flavor_line_item(sku):
    try:
        return Flavor.objects.get(sku=sku, quantity__gt=0)
    except Flavor.DoesNotExist:
        msg = 'We are out of {}'.format(sku)
        raise OutOfStock(msg)

def list_any_line_item(model, sku):
    try:
        return model.objects.get(sku=sku, quantity__gt=0)
    except ObjectDoesNotExist:
        msg = 'We are out of {}'.format(sku)
        raise OutOfStock(msg)
```

7.2.2 When You Just Want One Object but Get Three Back

If it's possible that your query may return more than one object, check for a `MultipleObjectsReturned` exception. Then in the `except` clause, you can do whatever makes sense, e.g. raise a special exception or log the error.

Example 7.2: Example Use of MultipleObjectsReturned

```

from flavors.models import Flavor
from store.exceptions import OutOfStock, CorruptedDatabase

def list_flavor_line_item(sku):
    try:
        return Flavor.objects.get(sku=sku, quantity__gt=0)
    except Flavor.DoesNotExist:
        msg = 'We are out of {}'.format(sku)
        raise OutOfStock(msg)
    except Flavor.MultipleObjectsReturned:
        msg = 'Multiple items have SKU {}. Please fix!'.format(sku)
        raise CorruptedDatabase(msg)

```

7.3 Use Lazy Evaluation to Make Queries Legible

Django's ORM is very powerful. And with such power comes the responsibility to make code legible, hence maintainable. With complex queries, attempt to avoid chaining too much functionality on a small set of lines:

Example 7.3: Illegible Queries

```

# Don't do this!
from django.db.models import Q

from promos.models import Promo

def fun_function(name=None):
    """Find working ice cream promo"""

    # Too much query chaining makes code go off the screen or page. Not good.
    return
    Promo.objects.active().filter(Q(name__startswith=name) | Q(descri

```

This is unpleasant, right? Yet if we add in advanced Django ORM tools, then it will go from unpleasant to as terrible as a sriracha-based ice cream topping. To mitigate this unpleasantness, we can use the lazy evaluation feature of Django queries to keep our ORM code clean.

By lazy evaluation, we mean that the Django ORM doesn't make the SQL calls until the data is actually needed. We can chain ORM methods and functions as much as we want,

and until we try to loop through the result, Django doesn't touch the database. Instead of being forced to chain many methods and advanced database features on a single line, we can break them up over as many lines as needed. This increases readability, which improves the ease of maintenance, which increases time for getting ice cream.

Here we take the code from *bad example 7.3* and break it up into more legible code:

Example 7.4: Legible Queries

```
# Do this!
from django.db.models import Q

from promos.models import Promo

def fun_function(name=None):
    """Find working ice cream promo"""
    results = Promo.objects.active()
    results = results.filter(
        Q(name__startswith=name) |
        Q(description__icontains=name)
    )
    results = results.exclude(status='melted')
    results = results.select_related('flavors')
    return results
```

As can be seen in the corrected code, we can more easily tell what the end result will be. Even better, by breaking up the query statement we can comment on specific lines of code.

7.3.1 Chaining Queries for Legibility

This technique borrows from the Pandas and JavaScript communities. Instead of using lazy evaluation, it's possible to chain queries thus:

Example 7.5: Chaining Queries

```
# Do this!
from django.db.models import Q

from promos.models import Promo

def fun_function(name=None):
    """Find working ice cream promo"""
```

```

qs = (Promo
      .objects
      .active()
      .filter(
          Q(name__startswith=name) |
          Q(description__icontains=name)
      )
      .exclude(status='melted')
      .select_related('flavors')
  )
return qs

```

The downside to this approach is that debugging isn't as easy as using the lazy evaluation method of writing a query. We simply can't stick a **PDB** or **IPDB** call in the middle of a query defined this way.

To get around this, we have to do a bit of commenting out:

Example 7.6: Debugging with Chained Queries

```

def fun_function(name=None):
    """Find working ice cream promo"""
    qs = (
        Promo
        .objects
        .active()
        # .filter(
        #     Q(name__startswith=name) |
        #     Q(description__icontains=name)
        # )
        # .exclude(status='melted')
        # .select_related('flavors')
    )
    breakpoint()
    return qs

```

7.4 Lean on Advanced Query Tools

Django's ORM is easy to learn, intuitive, and covers many use cases. Yet there are a number of things it does not do well. What happens then is that, after the queryset is returned, we begin processing more and more data in Python. This is a shame, because every database

manages and transforms data faster than Python (or Ruby, JavaScript, Go, Java, et al).

Instead of managing data with Python, we always try to use Django's advanced query tools to do the lifting. In doing so we not only benefit from increased performance, we also enjoy using code that is more proven (Django and most databases are constantly tested) than any Python-based workarounds we create.

7.4.1 Query Expressions

When performing reads on a database, query expressions can be used to create values or computations during that read. If that sounds confusing, don't feel alone, we're confused too. Since a code example is worth a thousand words, let's provide an example of how they can benefit us. In our case, we're trying to list all the customers who have on average ordered more than one scoop per visit to an ice cream store.

First, how this might be done, albeit dangerously, without query expressions:

Example 7.7: No Query Expressions

```
# Don't do this!
from models.customers import Customer

customers = []
for customer in Customer.objects.iterator():
    if customer.scoops_ordered > customer.store_visits:
        customers.append(customer)
```

This example makes us shudder with fear. Why?

- It uses Python to loop through all the Customer records in the database, one by one. This is slow and memory consuming.
- Under any volume of use, it will generate race conditions. This occurs when we're running the script while customers interact with the data. While probably not an issue in this simple 'READ' example, in real-world code combining that with an 'UPDATE' can lead to loss of data.

Fortunately, through query expressions Django provides a way to make this more efficient and race-condition free:

Example 7.8: Yes Query Expressions

```
from django.db.models import F

from models.customers import Customer

customers =
    Customer.objects.filter(scoops_ordered__gt=F('store_visits'))
```

What this does is use the database itself to perform the comparison. Under the hood, Django is running something that probably looks like:

Example 7.9: Query Expression Rendered as SQL

```
SELECT * from customers_customer where scoops_ordered >
    store_visits
```

Query Expressions should be in your toolkit. They increase the performance and stability of projects.

► docs.djangoproject.com/en/3.2/ref/models/expressions/

7.4.2 Database Functions

Since Django 1.8 we've been able to easily use common database functions such as `UPPER()`, `LOWER()`, `COALESCE()`, `CONCAT()`, `LENGTH()`, and `SUBSTR()`. Of all the advanced query tools provided by Django, these are our favorites. Why?

- ➊ Very easy to use, either on new projects or existing projects.
- ➋ Database functions allow us to move some of the logic from Python to the database. This can be a performance booster, as processing data in Python is not as fast as processing data in a database.
- ➌ Database functions are implemented differently per database, but Django's ORM abstracts this away. Code we write using them on PostgreSQL will work on MySQL or SQLite3.
- ➍ They are also query expressions, which means they follow a common pattern already established by another nice part of the Django ORM.

Reference:

► docs.djangoproject.com/en/3.2/ref/models/database-functions/

7.5 Don't Drop Down to Raw SQL Until It's Necessary

Whenever we write raw SQL we lose elements of security and reusability. This doesn't just apply to internal project code, but also to the rest of the Django world. Specifically, if you ever release one of your Django apps as a third-party package, using raw SQL will decrease the portability of the work. Also, in the rare event that the data has to be migrated from one database to another, any database-specific features that you use in your SQL queries will complicate the migration.

So when should you actually write raw SQL? If expressing your query as raw SQL would drastically simplify your Python code or the SQL generated by the ORM, then go ahead and do it. For example, if you're chaining a number of QuerySet operations that each operate on a large data set, there may be a more efficient way to write it as raw SQL.

TIP: Malcolm Tredinnick's Advice on Writing SQL in Django

Django core developer Malcolm Tredinnick said (paraphrased):

“The ORM can do many wonderful things, but sometimes SQL is the right answer. The rough policy for the Django ORM is that it's a storage layer that happens to use SQL to implement functionality. If you need to write advanced SQL you should write it. I would balance that by cautioning against overuse of the `raw()` and `extra()` methods.”

TIP: Jacob Kaplan-Moss' Advice on Writing SQL in Django

Django project co-leader Jacob Kaplan-Moss says (paraphrased):

“If it's easier to write a query using SQL than Django, then do it. `extra()` is nasty and should be avoided; `raw()` is great and should be used where appropriate.”

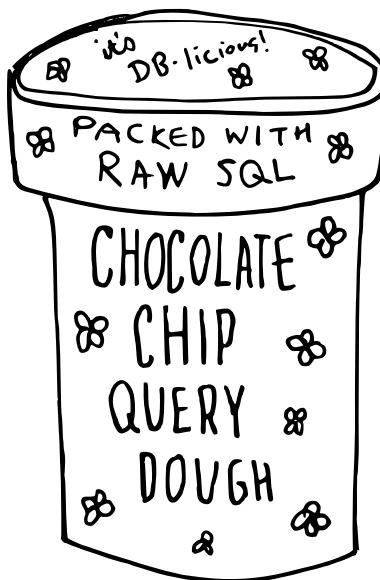


Figure 7.1: This flavor of ice cream contains raw SQL. It's a bit chewy.

7.6 Add Indexes as Needed

While adding `db_index=True` to any model field is easy, understanding when it should be done takes a bit of judgment. Our preference is to start without indexes and add them as needed.

When to consider adding indexes:

- The index would be used frequently, as in 10–25% of all queries.
- There is real data, or something that approximates real data, so we can analyze the results of indexing.
- We can run tests to determine if indexing generates an improvement in results.

When using PostgreSQL, `pg_stat_activity` tells us what indexes are actually being used.

Once a project goes live, [Chapter 26: Finding and Reducing Bottlenecks](#), has information on index analysis.

TIP: Class-Based Model Indexes

Django provides the `django.db.models.indexes` module, the `Index` class, and the `Meta.indexes` option. These make it easy to create all sorts of database indexes: just subclass `Index`, add it to `Meta.indexes`, and you're

done! `django.contrib.postgres.indexes` currently includes `BrinIndex` and `GinIndex`, but you can imagine `HashIndex`, `GistIndex`, `SpGistIndex`, and more.

- docs.djangoproject.com/en/3.2/ref/models/indexes/
- docs.djangoproject.com/en/3.2/ref/models/options/#indexes

7.7 Transactions

The default behavior of the ORM is to autocommit every query when it is called. In the case of data modification, this means that every time a `.create()` or `.update()` is called, it immediately modifies data in the SQL database. The advantage of this is that it makes it easier for beginning developers to understand the ORM. The disadvantage is that if a view (or some other operation) requires two or more database modifications to occur, if one modification succeeds and the other fails, the database is at risk of corruption.

The way to resolve the risk of database corruption is through the use of database transactions. A database transaction is where two or more database updates are contained in a single **unit of work**. If a single update fails, all the updates in the transaction are rolled back. To make this work, a database transaction, by definition, must be **atomic**, **consistent**, **isolated** and **durable**. Database practitioners often refer to these properties of database transactions using the acronym **ACID**.

Django has a powerful and relatively easy-to-use transaction mechanism. This makes it much easier to lock down database integrity on a project, using decorators and context managers in a rather intuitive pattern.

7.7.1 Wrapping Each HTTP Request in a Transaction

Example 7.10: Wrapping Each HTTP Request in a Transaction

```
# settings/base.py

DATABASES = {
    'default': {
        # ...
        'ATOMIC_REQUESTS': True,
    },
}
```

Django makes it easy to handle all web requests inside of a transaction with the

ATOMIC_REQUESTS setting. By setting it to True as shown above, all requests are wrapped in transactions, including those that only read data. The advantage of this approach is safety: all database queries in views are protected, the disadvantage is performance can suffer. We can't tell you just how much this will affect performance, as it depends on individual database design and how well various database engines handle locking.

We've found that this is a great way to ensure at the start that a write-heavy project's database maintains integrity. With lots of traffic, however, we've had to go back and change things to a more focused approach. Depending on the size this can be a small or monumental task.

Another thing to remember when using ATOMIC_REQUESTS, is that only the database state is rolled back on errors. It's embarrassing to send out a confirmation email and then have the transaction that wraps a request rolled back. This problem may crop up with any "write" to anything other than the database: sending email or SMS, calling a third-party API, writing to the filesystem, etc. Therefore, when writing views that create/update/delete records but interact with non-database items, you may choose to decorate the view with `transaction.non_atomic_requests()`.

WARNING: Aymeric Augustin on non_atomic_requests()

Core Django developer and main implementer of the new transaction system, Aymeric Augustin says, "This decorator requires tight coupling between views and models, which will make a code base harder to maintain. We might have come up with a better design if we hadn't had to provide for backwards-compatibility."

Then you can use the more explicit declaration as described below in this super-simple API-style function-based view:

Example 7.11: Simple Non-Atomic View

```
# flavors/views.py

from django.db import transaction
from django.http import HttpResponseRedirect
from django.shortcuts import get_object_or_404
from django.utils import timezone

from .models import Flavor

@transaction.non_atomic_requests
def posting_flavor_status(request, pk, status):
```

```
flavor = get_object_or_404(Flavor, pk=pk)

# This will execute in autocommit mode (Django's default).
flavor.latest_status_change_attempt = timezone.now()
flavor.save()

with transaction.atomic():
    # This code executes inside a transaction.
    flavor.status = status
    flavor.latest_status_change_success = timezone.now()
    flavor.save()
    return HttpResponseRedirect('Hooray')

# If the transaction fails, return the appropriate status
return HttpResponseRedirect('Sadness', status_code=400)
```

If you are using `ATOMIC_REQUESTS=True` and want to switch to a more focused approach described in the following section, we recommend an understanding of [Chapter 26: Finding and Reducing Bottlenecks](#), [Chapter 24: Testing Stinks and Is a Waste of Money!](#), and [Chapter 34: Continuous Integration](#) before you undertake this effort.

TIP: Projects Touching Medical or Financial Data

For these kinds of projects, engineer systems for eventual consistency rather than for transactional integrity. In other words, be prepared for transactions to fail and rollbacks to occur. Fortunately, because of transactions, even with a rollback, the data will remain accurate and clean.

7.7.2 Explicit Transaction Declaration

Explicit transaction declaration is one way to increase site performance. In other words, specifying which views and business logic are wrapped in transactions and which are not. The downside to this approach is that it increases development time.

TIP: Aymeric Augustin on ATOMIC_REQUESTS vs. Explicit Transaction Declaration

Aymeric Augustin says, ‘Use `ATOMIC_REQUESTS` as long as the performance overhead is bearable. That means “forever” on most sites.’

When it comes to transactions, here are some good guidelines to live by:

- Database operations that do not modify the database *should not be* wrapped in transactions.
- Database operations that modify the database *should be* wrapped in a transaction.
- Special cases including database modifications that require database reads and performance considerations can affect the previous two guidelines.

If that's not clear enough, here is a table explaining when different Django ORM calls should be wrapped in transactions.

Purpose	ORM method	Generally Use Transactions?
Create Data	.create(), .bulk_create(), .get_or_create(),	✓
Retrieve Data	.get(), .filter(), .count(), .iterator(), .exists(), .exclude(), .in_bulk, etc.	
Modify Data	.update()	✓
Delete Data	.delete()	✓

Table 7.1: When to Use Transactions

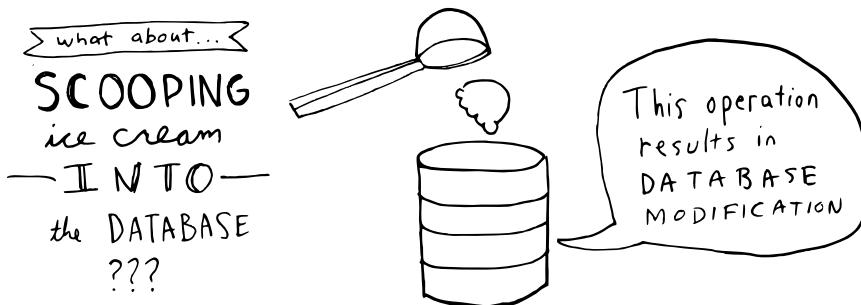


Figure 7.2: Because no one loves ice cream quite like a database.

We also cover this in [Chapter 26: Finding and Reducing Bottlenecks](#), specifically subsection [Section 26.2.4: Switch ATOMIC_REQUESTS to False](#).

TIP: Never Wrap Individual ORM Method Calls

Django's ORM actually relies on transactions internally to ensure consistency of data. For instance, if an update affects multiple tables because of concrete inheritance, Django has that wrapped up in transactions.

Therefore, it is never useful to wrap an individual ORM method [`.create()`, `.update()`, `.delete()`] call in a transaction. Instead, use explicit transactions when you are calling several ORM methods in a view, function, or method.

7.7.3 `django.http.StreamingHttpResponse` and Transactions

If a view is returning `django.http.StreamingHttpResponse`, it's impossible to handle transaction errors once the response has begun. If your project uses this response method then `ATOMIC_REQUESTS` should do one of the following:

- ➊ Set `ATOMIC_REQUESTS` to Django's default, which is `False`. Then you can use the techniques explored in [Section 7.7.2: Explicit Transaction Declaration](#). Or...
- ➋ Wrap the view in the `django.db.transaction.non_atomic_requests` decorator.

Keep in mind that you can use `ATOMIC_REQUESTS` with a streaming response, but the transaction will only apply to the view itself. If the generation of the response stream triggers additional SQL queries, they will be made in autocommit mode. Hopefully generating a response doesn't trigger database writes...

7.7.4 Transactions in MySQL

If the database being used is **MySQL**, transactions may not be supported depending on your choice of table type such as **InnoDB** or **MyISAM**. If transactions are not supported, Django will always function in autocommit mode, regardless of `ATOMIC_REQUESTS` or code written to support transactions. For more information, we recommend reading the following articles:

- docs.djangoproject.com/en/3.2/topics/db/transactions/#transactions-in-mysql
- dev.mysql.com/doc/refman/8.0/en/sql-transactional-statements.html

7.7.5 Django ORM Transaction Resources

- docs.djangoproject.com/en/3.2/topics/db/transactions/ Django's documentation on transactions.
- Real Python has a great tutorial on the subject of transactions. While written for Django 1.6, much of the material remains pertinent to this day. realpython.com/blog/python/transaction-management-with-django-1-6

7.8 Summary

In this chapter we went over different ways to query a project's persistent data.

We recommend using indexes once there is a better feel for how the data actually works throughout the project.

Now that we know how to store and index data, let's begin to display it. Starting with the next chapter we're diving into views!

8 | Function- And Class-Based Views

Both function-based views (FBVs) and class-based views (CBVs) are a core part of Django. We recommend that you understand how to use both types of views.

8.1 When to Use FBVs or CBVs

Whenever you implement a view, think about whether it would make more sense to implement as an FBV or as a CBV. Some views are best implemented as CBVs, and others are best implemented as FBVs.

If you aren't sure which method to choose, on the next page we've included a flow chart that might be of assistance.

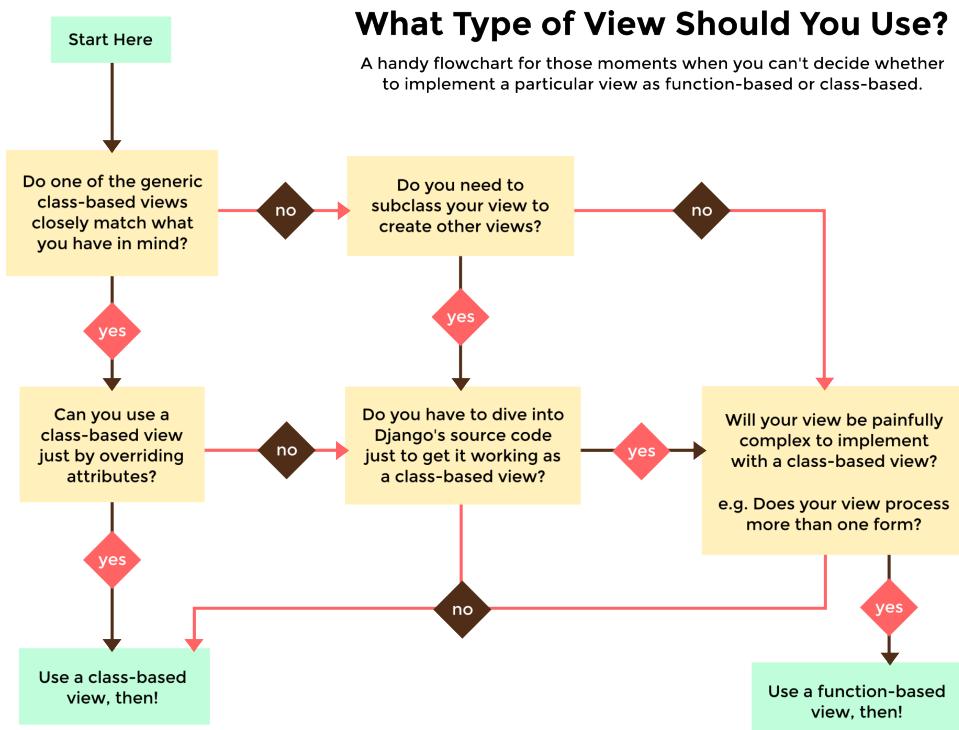


Figure 8.1: Should you use an FBV or a CBV? flow chart.

This flowchart follows our preference for using CBVs over FBVs. We prefer to use CBVs for most views, using FBVs to implement only the custom error views or complicated ones that would be a pain to implement with CBVs.

TIP: Alternative Approach - Staying With FBVs

Some developers prefer to err on the side of using FBVs for most views and CBVs only for views that need to be subclassed. That strategy is fine as well.

8.2 Keep View Logic Out of URLConfs

Requests are routed to views via **URLConfs**, in a module that is normally named `urls.py`. Per Django's URL design philosophy (docs.djangoproject.com/en/3.2/misc/design-philosophies/#url-design), the coupling of views with urls is loose, allows for infinite flexibility, and encourages best practices.

And yet, this is what Daniel feels like yelling every time he sees complex `urls.py` files:

"I didn't write J2EE XML and Zope ZCML configuration files back in the day just so you darn kids could stick logic into Django url modules!"

Remember that Django has a wonderfully simple way of defining URL routes. Like everything else we bring up in this book, that simplicity is to be honored and respected. The rules of thumb are this:

- ① The views modules should contain view logic.
- ② The URL modules should contain URL logic.

Ever see code like this? Perhaps in the official documentation for Class-Based Views?

Example 8.1: Django CBV-Style URLconf Modules

```
# Don't do this!
from django.urls import path
from django.views.generic import DetailView

from tastings.models import Tasting

urlpatterns = [
    path('<int:pk>',
        DetailView.as_view(
            model=Tasting,
            template_name='tastings/detail.html'),
        name='detail'),
    path('<int:pk>/results/',
        DetailView.as_view(
            model=Tasting,
            template_name='tastings/results.html'),
        name='results'),
]
```

At a glance this code might seem okay, but we argue that it violates the Django design philosophies:

- **Loose coupling** between views, urls, and models has been replaced with tight coupling, meaning you can never reuse the view definitions.
- **Don't Repeat Yourself** is violated by using the same/similar arguments repeatedly between CBVs.
- Infinite flexibility (for URLs) is destroyed. Class inheritance, the primary advantage of Class Based Views, is impossible using this anti-pattern.
- Lots of other issues: What happens when you have to add in authentication? And what about authorization? Are you going to wrap each URLConf view with two or

more decorators? Putting your view code into your URLConfs quickly turns your URLConfs into an unmaintainable mess.

In fact, we've heard from developers that seeing CBVs defined in URLConfs this way was part of why they steered clear of using them.

Alright, enough griping. We'll show our preferences in the next section.

8.3 Stick to Loose Coupling in URLConfs

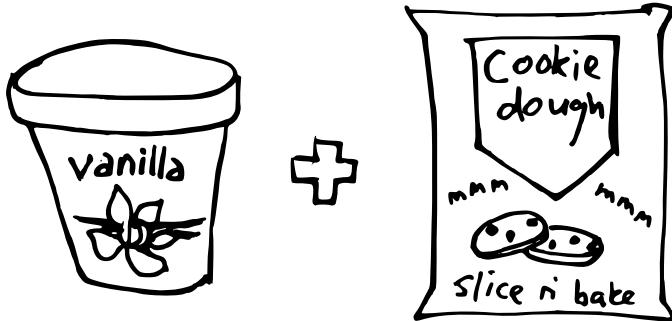


Figure 8.2: Loose coupling of chocolate chip cookie dough ice cream.

Here is how to create URLConfs that avoid the problems we mentioned on the previous page. First, we write the views:

Example 8.2: tastings/views.py

```
from django.urls import reverse
from django.views.generic import ListView, DetailView, UpdateView

from .models import Tasting

class TasteListView(ListView):
    model = Tasting

class TasteDetailView(DetailView):
    model = Tasting

class TasteResultsView(TasteDetailView):
    template_name = 'tastings/results.html'

class TasteUpdateView(UpdateView):
    model = Tasting
```

```
def get_success_url(self):
    return reverse('tastings:detail',
                  kwargs={'pk': self.object.pk})
```

Then we define the urls:

Example 8.3: tastings/urls.py

```
from django.urls import path

from . import views

urlpatterns = [
    path(
        route='',
        view=views.TasteListView.as_view(),
        name='list'
    ),
    path(
        route='<int:pk>',
        view=views.TasteDetailView.as_view(),
        name='detail'
    ),
    path(
        route='<int:pk>/results/',
        view=views.TasteResultsView.as_view(),
        name='results'
    ),
    path(
        route='<int:pk>/update/',
        view=views.TasteUpdateView.as_view(),
        name='update'
    )
]
```

Your first response to our version of this should go something like, “*Are you sure this is a good idea? You changed things to use two files AND more lines of code! How is this better?*”

Well, this is the way we do it. Here are some of the reasons we find it so useful:

- **Don't Repeat Yourself:** No argument or attribute is repeated between views.
- **Loose coupling:** We've removed the model and template names from the URLConf because views should be views and URLConfs should be URLConfs. We should be able to call our views from one or more URLConfs, and our approach lets us do just that.
- **URLConfs should do one thing and do it well:** Related to our previous bullet, our URLConf is now focused primarily on just one thing: URL routing. We aren't tracking down view logic across both views and URLConfs, we just look in our views.
- **Our views benefit from being class-based:** Our views, by having a formal definition in the views module, can inherit from other classes. This means adding authentication, authorization, new content formats, or any other business requirement tossed our way is much easier to handle.
- **Infinite flexibility:** Our views, by having a formal definition in the views module, can implement their own custom logic.

8.3.1 What if We Aren't Using CBVs?

The same rules apply.

We've encountered debugging nightmares of projects using FBVs with extensive URLConf hackery, such as elaborate tricks with the `__file__` attribute of Python modules combined with directory walking and regular expressions to automagically create URLConfs. If that sounds painful, it was.

Keep logic out of URLConfs!

8.4 Use URL Namespaces

What URL namespaces do is provide an identifier for app-level and instance level namespaces. URL namespaces are one of those things where on the surface they seem like they might not help much, but once a developer begins using them they wonder why they didn't use them already. We'll sum up using URL namespaces as follows:

Instead of writing URL names like `tastings_detail` write them like `tastings:detail`.

Before we explain why this is so useful, we'll provide an example of usage based on the app-level URLConf code from example 8.2. In the root URLConf we would add:

Example 8.4: Snippet of urls.py At Root of Project

```
urlpatterns += [
    path('tastings/', include('tastings.urls',
        ↪ namespace='tastings')),
]
```

To see this in action in a view, let's take a look at a snippet of code from example 8.1:

Example 8.5: Snippet of tastings/views.py

```
# tastings/views.py snippet
class TasteUpdateView(UpdateView):
    model = Tasting

    def get_success_url(self):
        return reverse('tastings:detail',
            kwargs={'pk': self.object.pk})
```

See this in action in an HTML template:

Example 8.6: taste_list.html

```
{% extends 'base.html' %}

{% block title %}Tastings{% endblock title %}

{% block content %}



    {% for taste in tastings %}
        <li>
            <a href="{% url 'tastings:detail' taste.pk %}">{{ taste.title }}</a>
            <small>
                <a href="{% url 'tastings:update' taste.pk %}">update</a>
            </small>
        </li>
    {% endfor %}


{% endblock content %}
```

Now that we understand how to implement URL namespaces, let's cover why they are useful.

8.4.1 Makes for Shorter, More Intuitive, and Don't Repeat Yourself URL Names

In example 8.3 what we don't see are URL names like "tastings_detail" and "tastings_results" that copy the model or app name. Instead there are simple, intuitive names like "detail" and "results". This greatly increases the legibility of apps, especially to newer Django developers.

Also, who wants to type "tastings" or whatever an app is called so many extra times?

8.4.2 Increases Interoperability With Third-Party Libraries

One of the problems of writing URL names like <myapp>_detail is when app names collide. While this might not be a problem with things like our *tastings* app, it's certainly happened to the authors with blog and contact applications. Fortunately, URL namespaces makes this easy to resolve. Assuming that we have an existing contact app, but needed to add a second one, using URL namespaces we could integrate them to our root URLConf like so:

Example 8.7: Root URLConf Interoperability

```
# urls.py at root of project
urlpatterns += [
    path('contact/', include('contactmonger.urls',
                            ↪ namespace='contactmonger')),

    path('report-problem/', include('contactapp.urls',
                                    ↪ namespace='contactapp')),
]
```

Then work them into our templates doing the following:

Example 8.8: contact.html

```
{% extends "base.html" %}
{% block title %}Contact{% endblock title %}
{% block content %}
```

```
<p>
    <a href="{% url 'contactmonger:create' %}">Contact Us</a>
</p>
<p>
    <a href="{% url 'contactapp:report' %}">Report a Problem</a>
</p>
{% endblock content %}
```

8.4.3 Easier Searches, Upgrades, and Refactors

Considering the prevalence of underscores in names for PEP 8-friendly frameworks like Django, searching code or names like “`tastings_detail`” can be challenging. When a result comes up, is that for a view name, a URL name, or something else?

On the other hand, searching for “`tastings:detail`” makes for intuitive search result responses. This can and has made upgrades and refactoring of apps and projects easier, including when interacting with new third-party libraries.

8.4.4 Allows for More App and Template Reverse Tricks

We’re not going to cover any tricks here, because we feel such things are almost never justified. In fact, they usually just add to the complexity of a project without adding any tangible benefit. However, there are a couple of use cases worth mentioning:

- Development tools like `django-debug-toolbar` that perform debug-level introspection.
- Projects that allow end-users to add “modules” to change or alter the behavior of their account.

While developers can use either of these to justify the use of creative URL namespaces tricks, as always, we recommend trying the simplest approach first.

8.5 Try to Keep Business Logic Out of Views

In the past, we’ve placed an amazing amount of sophisticated business logic into our views. Unfortunately, when it became time to generate PDFs, add a REST API, or serve out other formats, placing so much logic in our views made it much harder to deliver new formats.

This is where our preferred approach of model methods, manager methods, or general utility helper functions come into play. When business logic is placed into easily reusable components, and called from within views, it makes extending components of the project to do more things much easier.

Since it’s not always possible to do this at the beginning of a project, our rule of thumb has become whenever we find ourselves duplicating business logic instead of Django boilerplate between views, it’s time to move code out of the view.

8.6 Django Views Are Functions

When it comes down to it, every Django view is a function. This function takes an HTTP request object and turns it into an HTTP response object. If you know anything about basic mathematical functions, this process of change should look very familiar.

Example 8.9: Django Views as Mathematical Functions

```
# Django FBV as a function
HttpResponse = view(HttpRequest)

# Deciphered into basic math (remember functions from algebra?)
y = f(x)

# ... and then translated into a CBV example
HttpResponse = View.as_view()(HttpRequest)
```

This concept of change serves as a foundation for all sorts of things you can do with Django views, be they function- or class-based.

TIP: Class-Based Views Are Actually Called as Functions

Django's CBVs appear to be very different than FBVs. However, the `View.as_view()` classmethod called in URLConfs is actually returning a callable instance of the view. In other words, a callback function that handles the request/response cycle in exactly the same manner as a function-based view!

8.6.1 The Simplest Views

With this in mind, it's good to remember the simplest possible views that can be created with Django:

Example 8.10: simplest_views.py

```
from django.http import HttpResponse
from django.views.generic import View

# The simplest FBV
def simplest_view(request):
    # Business logic goes here
    return HttpResponse('FBV')

# The simplest CBV
class SimplestView(View):
    def get(self, request, *args, **kwargs):
        # Business logic goes here
        return HttpResponse('CBV')
```

Why is this useful to know?

- ▶ Sometimes we need one-off views that do tiny things.
- ▶ Understanding the simplest Django views means we better understand what they are really doing.
- ▶ Illustrates how Django FBVs are HTTP method neutral, but Django CBVs require specific HTTP method declaration.

8.7 Don't Use `locals()` as Views Context

Returning `locals()` from any callable is an anti-pattern. While it seems like a handy shortcut, in fact it is a time consuming nightmare. Let's use an example to explore why. Here is a view following this anti-pattern:

Example 8.11: Inappropriate Use of `locals()`

```
# Don't do this!
def ice_cream_store_display(request, store_id):
    store = get_object_or_404(Store, id=store_id)
    date = timezone.now()
    return render(request, 'melted_ice_cream_report.html',
                  locals())
```

On the surface everything *seems* fine.

However, we've gone from an explicit design to implicit anti-pattern, making this simple view annoying to maintain. Specifically that we don't know what the view is supposed to return. This becomes an issue because changing any of the variables returned by the view is not immediately apparent:

Example 8.12: Altered Version of Previous Code Example

```
# Don't do this!
def ice_cream_store_display(request, store_id):
    store = get_object_or_404(Store, id=store_id)
    now = timezone.now()
    return render(request, 'melted_ice_cream_report.html',
                  locals())
```

How long did it take you to spot the difference between Bad Example 8.11 and Bad Example 8.12? This was a simple example, imagine a more complicated one with a large template. This is why we strongly advocate use of explicit context in views:

Example 8.13: Explicit View Context

```
def ice_cream_store_display(request, store_id):
    return render(
        request,
        'melted_ice_cream_report.html',
        {
            'store': get_object_or_404(Store, id=store_id),
            'now': timezone.now()
        }
)
```

- Alex Martelli's Reasoning: stackoverflow.com/a/1901720

8.8 Summary

This chapter started with discussing when to use either FBVs or CBVs, and matched our own preference for the latter. In fact, in the next chapter we'll start to dig deep into the functionality that can be exploited when using FBVs, followed up by a chapter on CBVs.

We also discussed keeping view logic out of the URLConfs. We feel view code belongs in the apps' *views.py* modules, and URLConf code belongs in the apps' *urls.py* modules. Adhering to this practice allows for object inheritance when used with class-based views, easier code reuse, and greater flexibility of design.

9 | Best Practices for Function-Based Views

Since the beginning of the Django project, **function-based views** have been in frequent use by developers around the world. While class-based views have risen in usage, the simplicity of using a function is appealing to both new and experienced developers alike. While the authors are in the camp of preferring CBVs, we work on projects that use FBVs and here are some patterns we've grown to enjoy.

9.1 Advantages of FBVs

The simplicity of FBVs comes at the expense of code reuse: FBVs don't have the same ability to inherit from superclasses the way that CBVs do. They do have the advantage of being more functional in nature, which lends itself to a number of interesting strategies.

We follow these guidelines when writing FBVs:

- Less view code is better.
- Never repeat code in views.
- Views should handle presentation logic. Try to keep business logic in models when possible, or in forms if you must.
- Keep your views simple.
- Use them to write custom 403, 404, and 500 error handlers.
- Complex nested-if blocks are to be avoided.

9.2 Passing the HttpRequest Object

There are times where we want to reuse code in views, but not tie it into global actions such as **middleware** or **context processors**. Starting in the introduction of this book, we advised creating utility functions that can be used across the project.

For many utility functions, we are taking an attribute or attributes from the `djongo.http.HttpRequest` (or `HttpRequest` for short) object and gathering data or

performing operations. What we've found is by having the request object itself as a primary argument, we have simpler arguments on more methods. This means less cognitive overload of managing function/method arguments: just pass in the `HttpRequest` object!

Example 9.1: `sprinkles/utils.py`

```
from django.core.exceptions import PermissionDenied
from django.http import HttpRequest

def check_sprinkle_rights(request: HttpRequest) -> HttpRequest:
    if request.user.can_sprinkle or request.user.is_staff:
        return request

    # Return a HTTP 403 back to the user
    raise PermissionDenied
```

The `check_sprinkle_rights()` function does a quick check against the rights of the user, raising a `django.core.exceptions.PermissionDenied` exception, which triggers a custom HTTP 403 view as we describe in [Section 31.4.3: django.core.exceptions.PermissionDenied](#).

You'll note that we return back a `HttpRequest` object rather than an arbitrary value or even a `None` object. We do this because as Python is a dynamically typed language, we can attach additional attributes to the `HttpRequest`. For example:

Example 9.2: Enhanced `sprinkles/utils.py`

```
from django.core.exceptions import PermissionDenied
from django.http import HttpRequest, HttpResponseRedirect

def check_sprinkles(request: HttpRequest) -> HttpResponseRedirect:
    if request.user.can_sprinkle or request.user.is_staff:
        # By adding this value here it means our display templates
        # can be more generic. We don't need to have
        # {% if request.user.can_sprinkle or
        #     request.user.is_staff %}
        # instead just using
        # {% if request.can_sprinkle %}
        request.can_sprinkle = True
    return request
```

```
# Return a HTTP 403 back to the user
raise PermissionDenied
```

There's another reason, which we'll cover shortly. In the meantime, let's demonstrate this code in action:

Example 9.3: Passing the Request Object in FBVs

```
# sprinkles/views.py
from django.shortcuts import get_object_or_404
from django.shortcuts import render
from django.http import HttpResponseRedirect

from .models import Sprinkle
from .utils import check_sprinkles

def sprinkle_list(request: HttpResponseRedirect) -> HttpResponseRedirect:
    """Standard list view"""

    request = check_sprinkles(request)

    return render(request,
                  "sprinkles/sprinkle_list.html",
                  {"sprinkles": Sprinkle.objects.all()})

def sprinkle_detail(request: HttpResponseRedirect, pk: int) -> HttpResponseRedirect:
    """Standard detail view"""

    request = check_sprinkles(request)

    sprinkle = get_object_or_404(Sprinkle, pk=pk)

    return render(request, "sprinkles/sprinkle_detail.html",
                  {"sprinkle": sprinkle})

def sprinkle_preview(request: HttpResponseRedirect) -> HttpResponseRedirect:
    """Preview of new sprinkle, but without the
       check_sprinkles function being used.

    """

    sprinkle = Sprinkle.objects.all()
    return render(request,
```

```
"sprinkles/sprinkle_preview.html",
{"sprinkle": sprinkle})
```

Another good feature about this approach is that it's trivial to integrate into class-based views:

Example 9.4: Passing the Request Object in a CBV

```
from django.views.generic import DetailView

from .models import Sprinkle
from .utils import check_sprinkles

class SprinkleDetail(DetailView):
    """Standard detail view"""

    model = Sprinkle

    def dispatch(self, request, *args, **kwargs):
        request = check_sprinkles(request)
        return super().dispatch(request, *args, **kwargs)
```

TIP: Specific Function Arguments Have Their Place

The downside to single argument functions is that specific function arguments like 'pk', 'flavor' or 'text' make it easier to understand the purpose of a function at a glance. In other words, try to use this technique for actions that are as generic as possible.

Since we're repeatedly reusing functions inside functions, wouldn't it be nice to easily recognize when this is being done? This is when we bring decorators into play.

9.3 Decorators Are Sweet

For once, this isn't about ice cream, it's about code! In computer science parlance, **syntactic sugar** is a syntax added to a programming language in order to make things easier to read or to express. In Python, decorators are a feature added not out of necessity, but in order to make code cleaner and *sweeter* for humans to read. So yes, Decorators Are Sweet.

When we combine the power of simple functions with the syntactic sugar of decorators, we get handy, reusable tools like the extremely useful to the point of being ubiquitous `django.contrib.auth.decorators.login_required` decorator.

Here's a sample decorator template for use in function-based views:

Example 9.5: Simple Decorator Template

```
import functools

def decorator(view_func):
    @functools.wraps(view_func)
    def new_view_func(request, *args, **kwargs):
        # You can modify the request (HttpRequest) object here.
        response = view_func(request, *args, **kwargs)
        # You can modify the response (HttpResponse) object here.
        return response
    return new_view_func
```

That might not make too much sense, so we'll go through it step-by-step, using in-line code comments to clarify what we are doing. First, let's modify the decorator template from the previous example to match our needs:

Example 9.6: Decorator Example

```
# sprinkles/decorators.py
import functools

from . import utils

# based off the decorator template from the previous example
def check_sprinkles(view_func):
    """Check if a user can add sprinkles"""
    @functools.wraps(view_func)
    def new_view_func(request, *args, **kwargs):
        # Act on the request object with utils.can_sprinkle()
        request = utils.can_sprinkle(request)

        # Call the view function
        response = view_func(request, *args, **kwargs)

        # Return the HttpResponse object
        return response
    return new_view_func
```

Then we attach it to the function thus:

Example 9.7: Example of Using a Decorator

```
# sprinkles/views.py
from django.shortcuts import get_object_or_404, render

from .decorators import check_sprinkles
from .models import Sprinkle

# Attach the decorator to the view
@check_sprinkles
def sprinkle_detail(request: HttpRequest, pk: int) -> HttpResponse:
    """Standard detail view"""

    sprinkle = get_object_or_404(Sprinkle, pk=pk)

    return render(request, "sprinkles/sprinkle_detail.html",
                  {"sprinkle": sprinkle})
```

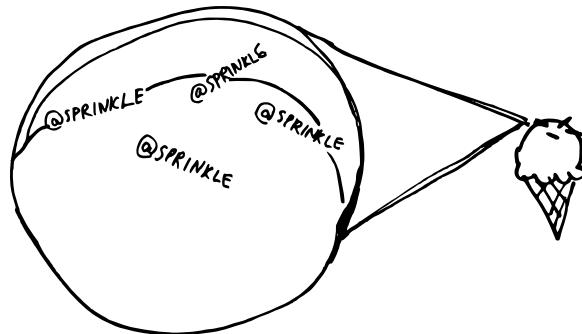


Figure 9.1: If you look at sprinkles closely, you'll see that they're Python decorators.

TIP: What About `functools.wraps()`?

Astute readers may have noticed that our decorator examples used the `functools.wraps()` decorator function from the Python standard library. This is a convenience tool that copies over metadata including critical info like docstrings to the newly decorated function. It's not necessary, but it makes project maintenance much easier.

9.3.1 Be Conservative With Decorators

As with any powerful tool, decorators can be used the wrong way. Too many decorators can create their own form of obfuscation, making even complex class-based view hierarchies seem simple in comparison. When using decorators, establish a limit of how many decorators can be set on a view and stick with it. Video on the subject: pyvideo.org/pycon-us-2011/pycon-2011--how-to-write-obfuscated-python.html

9.3.2 Additional Resources on Decorators

- Decorators Explained:
jeffknupp.com/blog/2013/11/29/improve-your-python-decorators-explained/
- Decorator Cheat Sheet by author Daniel Roy Greenfeld
daniel.feldroy.com/python-decorator-cheatsheet.html

9.4 Passing the HttpResponse Object

Just as with the `HttpRequest` object, we can also pass around the `HttpResponse` object from function to function. Think of this as a selective `Middleware.process_template_response()` method. See docs.djangoproject.com/en/3.2/topics/http/middleware/#process-template-response.

Yes, this technique can be leveraged with decorators. See Example 8.5 which gives a hint as to how this can be accomplished.

9.5 Additional Resources for Function-Based Views

Luke Plant is a core Django developer with strong opinions in favor of Function-Based Views. While we don't agree with most of his anti-CBV arguments he lists in the article linked below, this nevertheless is of immeasurable value to anyone writing FBVs:

spookylukey.github.io/django-views-the-right-way/

9.6 Summary

Function-based views are still alive and well in the Django world. If we remember that every function accepts an `HttpRequest` object and returns an `HttpResponse` object, we can use that to our advantage. We can leverage in generic `HttpRequest` and `HttpResponse` altering functions, which can also be used to construct decorator functions.

We'll close this chapter by acknowledging that every lesson we've learned about function-based views can be applied to what we begin to discuss next chapter, class-based views.

10 | Best Practices for Class-Based Views

Django provides a standard way to write class-based views (CBVs). In fact, as we mentioned in previous chapters, a Django view is just a callable that accepts a request object and returns a response. For function-based views (FBVs), the view function is that callable. For CBVs, the view class provides an `as_view()` class method that returns the callable. This mechanism is implemented in `django.views.generic.View`. All CBVs should inherit from that class, directly or indirectly.

Django also provides a series of generic class-based views (GCBVs) that implement common patterns found in most web projects and illustrate the power of CBVs.

PACKAGE TIP: Filling the Missing Parts of Django GCBVs

Out of the box, Django does not provide some very useful mixins for GCBVs. The `django-braces` library addresses most of these issues. It provides a set of clearly coded mixins that make Django GCBVs much easier and faster to implement. The library is so useful that three of its mixins have been copied into core Django.

10.1 Guidelines When Working With CBVs

- Less view code is better.
- Never repeat code in views.
- Views should handle presentation logic. Try to keep business logic in models when possible, or in forms if you must.
- Keep your views simple.
- Keep your **mixins** simpler.

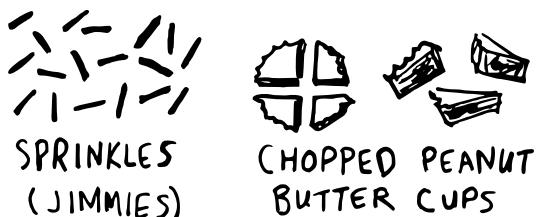
TIP: Familiarize Yourself With ccbv.co.uk

Arguably this should be placed as the sixth guideline, ccbv.co.uk is so useful that we felt it deserved its own tipbox. This site takes all the attributes and methods that every CBV defines or inherits and flattens it into one comprehensive page per view. Most Django developers, once they get past the tutorials on CBVs, rely on ccbv.co.uk more than the official documentation.

10.2 Using Mixins With CBVs

Think of mixins in programming along the lines of mixins in ice cream: you can enhance any ice cream flavor by mixing in crunchy candy bits, sliced fruit, or even bacon.

POPULAR ICE CREAM MIXINS



UNPOPULAR ICE CREAM MIXINS

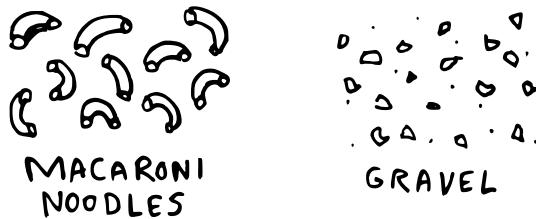


Figure 10.1: Popular and unpopular mixins used in ice cream.

Soft serve ice cream greatly benefits from mixins: ordinary vanilla soft serve turns into birthday cake ice cream when sprinkles, blue buttercream icing, and chunks of yellow cake are mixed in.

In programming, a mixin is a class that provides functionality to be inherited, but isn't meant for instantiation on its own. In programming languages with multiple inheritance, mixins can be used to add enhanced functionality and behavior to classes.

We can use the power of mixins to compose our own view classes for our Django apps.

When using mixins to compose our own view classes, we recommend these rules of inheritance provided by Kenneth Love. The rules follow Python's **method resolution order**,

which in the most simplistic definition possible, proceeds from left to right:

- ❶ The base view classes provided by Django *always* go to the right.
- ❷ Mixins go to the left of the base view.
- ❸ Mixins should not inherit from any other class. Keep your inheritance chain simple!

Example of the rules in action:

Example 10.1: Using Mixins in a View

```
from django.views.generic import TemplateView

class FreshFruitMixin:

    def get_context_data(self, **kwargs):
        context = super().get_context_data(**kwargs)
        context["has_fresh_fruit"] = True
        return context

class FruityFlavorView(FreshFruitMixin, TemplateView):
    template_name = "fruity_flavor.html"
```

In our rather silly example, the `FruityFlavorView` class inherits from both `FreshFruitMixin` and `TemplateView`.

Since `TemplateView` is the base view class provided by Django, it goes on the far right (rule 1), and to its left we place the `FreshFruitMixin` (rule 2). This way we know that our methods and properties will execute correctly.

10.3 Which Django GCBV Should Be Used for What Task?

The power of generic class-based views comes at the expense of simplicity: GCBVs come with a complex inheritance chain that can have up to eight superclasses on import. Trying to work out exactly which view to use or which method to customize can be very challenging at times.

To mitigate this challenge, here's a handy chart listing the name and purpose of each Django CBV. All views listed here are assumed to be prefixed with `django.views.generic`.

Name	Purpose	Two Scoops Example
View	Base view or handy view that can be used for anything.	See Section 10.6: Using Just <code>django.views.generic.View</code>.
RedirectView	Redirect user to another URL	Send users who visit '/login/' to '/login/'.
TemplateView	Display a Django HTML template.	The '/about/' page of our site.
ListView	List objects	List of ice cream flavors.
DetailView	Display an object	Details on an ice cream flavor.
FormView	Submit a form	The site's contact or email form.
CreateView	Create an object	Create a new ice cream flavor.
UpdateView	Update an object	Update an existing ice cream flavor.
DeleteView	Delete an object	Delete an unpleasant ice cream flavor like Vanilla Steak.
Generic date views	For display of objects that occur over a range of time.	Blogs are a common reason to use them. For Two Scoops, we could create a public history of when flavors have been added to the database.

Table 10.1: Django CBV Usage Table

TIP: The Three Schools of Django CBV/GCBV Usage

We've found that there are three major schools of thought around CBV and GCBV usage. They are:

The School of “Use all the generic views!”

This school of thought is based on the idea that since Django provides functionality to reduce your workload, why not use that functionality? We tend to belong to this school of thought, and have used it to great success, rapidly building and then maintaining a number of projects.

The School of “Just use `django.views.generic.View`”

This school of thought is based on the idea that the base Django CBV does just enough and is ‘the True CBV, everything else is a Generic CBV’. In the past year, we've found this can be a really useful approach for tricky tasks for which the resource-based approach of “Use all the views” breaks down. We'll cover some use cases for it in this chapter.

The School of “Avoid them unless you're actually subclassing views”

Jacob Kaplan-Moss says, “My general advice is to start with function views since they're easier to read and understand, and only use CBVs where you need them. Where do you need them? Any place where you need a fair chunk of code to be reused among multiple views.”

We generally belong to the first school, but it's good for you to know that there's no real consensus on best practices here.

10.4 General Tips for Django CBVs

This section covers useful tips for all or many Django CBV and GCBV implementations. We've found they expedite writing of views, templates, and their tests. These techniques will work with Class-Based Views or Generic Class-Based Views. As always for CBVs in Django, they rely on object oriented programming techniques.

10.4.1 Constraining Django CBV/GCBV Access to Authenticated Users

The Django CBV documentation gives a helpful working example of using the `django.contrib.auth.decorators.login_required` decorator with a CBV, but this example violates the rule of keeping logic out of `urls.py`:

docs.djangoproject.com/en/3.2/topics/class-based-views/intro/#decorating-class-based-views.

Fortunately, Django provides a ready implementation of a `LoginRequiredMixin` object that you can attach in moments. For example, we could do the following in all of the Django GCBVs that we've written so far:

Example 10.2: Using LoginRequiredMixin

```
# flavors/views.py
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import DetailView

from .models import Flavor

class FlavorDetailView(LoginRequiredMixin, DetailView):
    model = Flavor
```

TIP: Don't Forget the GCBV Mixin Order!

Remember that:

- `LoginRequiredMixin` must always go on the far left side.
- The base view class must always go on the far right side.

If you forget and switch the order, you will get broken or unpredictable results.

WARNING: Overriding dispatch() When Using LoginRequiredMixin

If you use `LoginRequiredMixin` and override the `dispatch` method, make sure that the *first thing you do* is call `super().dispatch(request, *args, **kwargs)`. Any code before the `super()` call is executed even if the user is not authenticated.

10.4.2 Performing Custom Actions on Views With Valid Forms

When you need to perform a custom action on a view with a `valid` form, the `form_valid()` method is where the GCBV workflow sends the request.

Example 10.3: Custom Logic with Valid Forms

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView

from .models import Flavor

class FlavorCreateView(LoginRequiredMixin, CreateView):
    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']

    def form_valid(self, form):
        # Do custom logic here
        return super().form_valid(form)
```

To perform custom logic on form data that has already been validated, simply add the logic to `form_valid()`. The return value of `form_valid()` should be a `django.http.HttpResponseRedirect`.

10.4.3 Performing Custom Actions on Views With Invalid Forms

When you need to perform a custom action on a view with an `invalid` form, the `form_invalid()` method is where the Django GCBV workflow sends the request. This method should return a `django.http.HttpResponse`.

Example 10.4: Overwriting Behavior of `form_invalid`

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView

from .models import Flavor

class FlavorCreateView(LoginRequiredMixin, CreateView):
    model = Flavor

    def form_invalid(self, form):
        # Do custom logic here
        return super().form_invalid(form)
```

Just as you can add logic to `form_valid()`, you can also add logic to `form_invalid()`.

You'll see an example of overriding both of these methods in [Section 13.5.1: ModelForm Data Is Saved to the Form, Then the Model Instance](#).

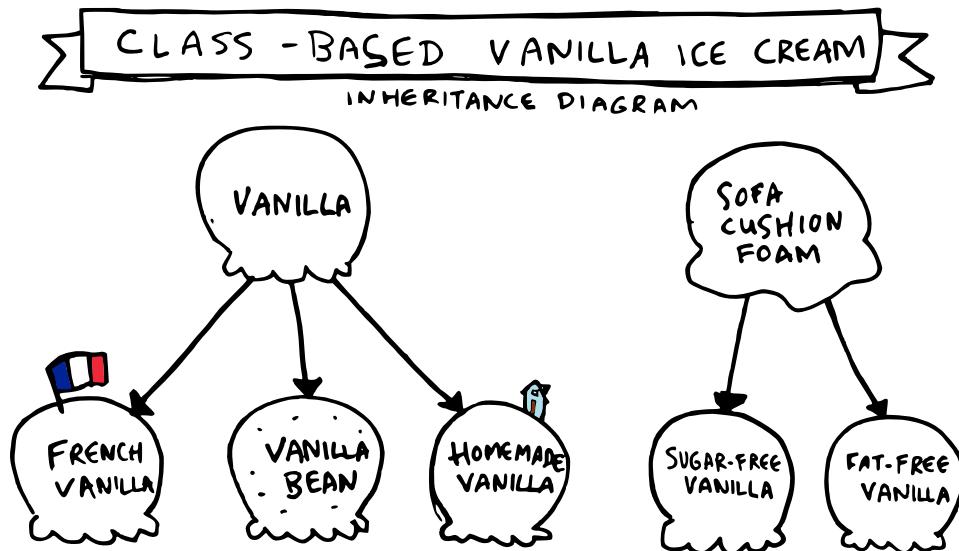


Figure 10.2: The other CBV: class-based vanilla ice cream.

10.4.4 Using the View Object

If you are using class-based views for rendering content, consider using the view object itself to provide access to properties and methods that can be called by other methods and properties. They can also be called from templates. For example:

Example 10.5: Using the View Object

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.utils.functional import cached_property
from django.views.generic import UpdateView, TemplateView

from .models import Flavor
from .tasks import update_user_who_favorited

class FavoriteMixin:

    @cached_property
    def likes_andFavorites(self):
        """Returns a dictionary of likes and favorites"""


```

```

        likes = self.object.likes()
        favorites = self.object.favorites()
        return {
            "likes": likes,
            "favorites": favorites,
            "favorites_count": favorites.count(),
        }

    class FlavorUpdateView(LoginRequiredMixin, FavoriteMixin,
    ↪ UpdateView):
        model = Flavor
        fields = ['title', 'slug', 'scoops_remaining']

        def form_valid(self, form):
            update_user_who_favorited(
                instance=self.object,
                favorites=self.likes_andFavorites['favorites']
            )
            return super().form_valid(form)

    class FlavorDetailView(LoginRequiredMixin, FavoriteMixin,
    ↪ TemplateView):
        model = Flavor

```

The nice thing about this is the various `flavors/` app templates can now access this property:

Example 10.6: Using View Methods in flavors/base.html

```

"># flavors/base.html #
{% extends "base.html" %}

{% block likes_andFavorites %}
<ul>
    <li>Likes: {{ view.likes_andFavorites.likes }}</li>
    <li>Favorites: {{ view.likes_andFavorites.favorites_count
    ↪ }}</li>
</ul>
{% endblock likes_andFavorites %}

```

10.5 How GCBVs and Forms Fit Together

A common source of confusion with GCBVs is their usage with Django forms.

Using our favorite example of the ice cream flavor tracking app, let's chart out a couple of examples of how form-related views might fit together.

First, let's define a flavor model to use in this section's view examples:

Example 10.7: Flavor Model

```
# flavors/models.py
from django.db import models
from django.urls import reverse

class Flavor(models.Model):
    class Scoops(models.IntegerChoices):
        SCOOPS_0 = 0
        SCOOPS_1 = 1

        title = models.CharField(max_length=255)
        slug = models.SlugField(unique=True)
        scoops_remaining = models.IntegerField(choices=Scoops.choices,
                                                default=Scoops.SCOOPS_0)

    def get_absolute_url(self):
        return reverse("flavors:detail", kwargs={"slug":
            self.slug})
```

Now, let's explore some common Django form scenarios that most Django users run into at one point or another.

10.5.1 Views + ModelForm Example

This is the simplest and most common Django form scenario. Typically when you create a model, you want to be able to add new records and update existing records that correspond to the model.

In this example, we'll show you how to construct a set of views that will create, update and display Flavor records. We'll also demonstrate how to provide confirmation of changes.

Here we have the following views:

- ① **FlavorCreateView** corresponds to a form for adding new flavors.
- ② **FlavorUpdateView** corresponds to a form for editing existing flavors.
- ③ **FlavorDetailView** corresponds to the confirmation page for both flavor creation and flavor updates.

To visualize our views:

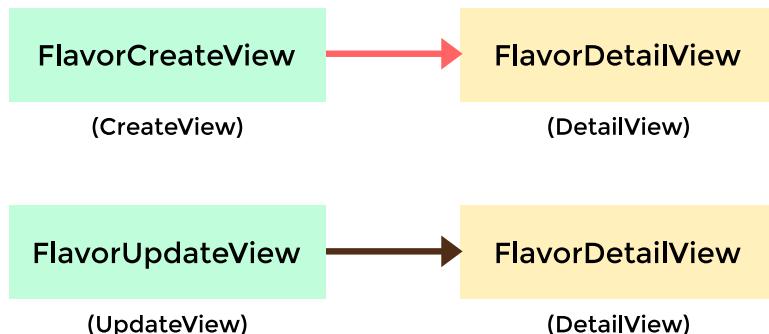


Figure 10.3: Views + ModelForm Flow

Note that we stick as closely as possible to Django naming conventions. `FlavorCreateView` subclasses Django's `CreateView`, `FlavorUpdateView` subclasses Django's `UpdateView`, and `FlavorDetailView` subclasses Django's `DetailView`.

Writing these views is easy, since it's mostly a matter of using what Django gives us:

Example 10.8: Building Views Quickly with CBVs

```

# flavors/views.py
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView, DetailView, UpdateView

from .models import Flavor

class FlavorCreateView(LoginRequiredMixin, CreateView):
    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']

class FlavorUpdateView(LoginRequiredMixin, UpdateView):
    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']

class FlavorDetailView(DetailView):
  
```

```
model = Flavor
```

Simple at first glance, right? We accomplish so much with just a little bit of code!

But wait, there's a catch. If we wire these views into a `urls.py` module and create the necessary templates, we'll uncover a problem:

The FlavorDetailView is not a confirmation page.

For now, that statement is correct. Fortunately, we can fix it quickly with a few modifications to existing views and templates.

The first step in the fix is to use `django.contrib.messages` to inform the user visiting the `FlavorDetailView` that they just added or updated the flavor.

We'll need to override the `FlavorCreateView.form_valid()` and `FlavorUpdateView.form_valid()` methods. We can do this conveniently for both views with a `FlavorActionMixin`.

For the confirmation page fix, we change `flavors/views.py` to contain the following:

Example 10.9: Success Message Example

```
# flavors/views.py
from django.contrib import messages
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView, DetailView, UpdateView

from .models import Flavor

class FlavorActionMixin:

    fields = ['title', 'slug', 'scoops_remaining']

    @property
    def success_msg(self):
        return NotImplemented

    def form_valid(self, form):
        messages.info(self.request, self.success_msg)
        return super().form_valid(form)
```

```

class FlavorCreateView(LoginRequiredMixin, FlavorActionMixin,
                      CreateView):
    model = Flavor
    success_msg = "Flavor created!"

class FlavorUpdateView(LoginRequiredMixin, FlavorActionMixin,
                      UpdateView):
    model = Flavor
    success_msg = "Flavor updated!"

class FlavorDetailView(DetailView):
    model = Flavor

```

Earlier in this chapter, we covered a simpler example of how to override `form_valid()` within a GCBV. Here, we reuse a similar `form_valid()` override method by creating a mixin to inherit from in multiple views.

Now we're using Django's **messages** framework to display confirmation messages to the user upon every successful add or edit. We define a `FlavorActionMixin` whose job is to queue up a confirmation message corresponding to the action performed in a view.

TIP: This replicates SuccessMessageMixin

Since we wrote this section in 2013, Django has implemented `django.contrib.messages.views.SuccessMessageMixin`, which provides similar functionality.

Reference: <https://docs.djangoproject.com/en/3.2/ref/contrib/messages/#django.contrib.messages.views.SuccessMessageMixin>

TIP: Mixins Shouldn't Inherit From Other Object

Please take notice that the `FlavorActionMixin` is a base class, not inheriting from another class in our code rather than a pre-existing mixin or view. It's important that mixins have as shallow inheritance chain as possible. Simplicity is a virtue!

After a flavor is created or updated, a list of messages is passed to the context of the `FlavorDetailView`. We can see these messages if we add the following code to the views' template and then create or update a flavor:

Example 10.10: flavor_detail.html

```
{% if messages %}
    <ul class="messages">
        {% for message in messages %}
            <li id="message_{{ forloop.counter }}"
                {% if message.tags %} class="{{ message.tags }}"{%
                endif %}>
                {{ message }}
            </li>
        {% endfor %}
    </ul>
{% endif %}
```

TIP: Reuse the Messages Template Code!

It is common practice to put the above code into your project's base HTML template. Doing this allows message support for templates in your project.

To recap, this example demonstrated yet again how to override the `form_valid()` method, incorporate this into a mixin, how to incorporate multiple mixins into a view, and gave a quick introduction to the very useful `django.contrib.messages` framework.

10.5.2 Views + Form Example

Sometimes you want to use a Django Form rather than a ModelForm. Search forms are a particularly good use case for this, but you'll run into other scenarios where this is true as well.

In this example, we'll create a simple flavor search form. This involves creating an HTML form that doesn't modify any flavor data. The form's action will query the ORM, and the records found will be listed on a search results page.

Our intention is that when using our flavor search page, if users do a flavor search for "Dough", they should be sent to a page listing ice cream flavors like "Chocolate Chip Cookie Dough," "Fudge Brownie Dough," "Peanut Butter Cookie Dough," and other flavors containing the string "Dough" in their title. Mmm, we definitely want this feature in our web application.

There are more complex ways to implement this, but for our simple use case, all we need is a single view. We'll use a `FlavorListView` for both the search page and the search results

page.

Here's an overview of our implementation:

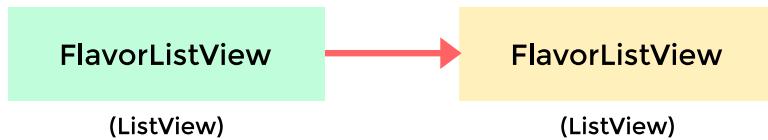


Figure 10.4: Views + Form Flow

In this scenario, we want to follow the standard internet convention for search pages, where 'q' is used for the search query parameter. We also want to accept a GET request rather than a POST request, which is unusual for forms but perfectly fine for this use case. Remember, this form doesn't add, edit, or delete objects, so we don't need a POST request here.

To return matching search results based on the search query, we need to modify the standard queryset supplied by the `ListView`. To do this, we override the `ListView`'s `get_queryset()` method. We add the following code to `flavors/views.py`:

Example 10.11: List View Combined with Q Search

```

from django.views.generic import ListView

from .models import Flavor

class FlavorListView(ListView):
    model = Flavor

    def get_queryset(self):
        # Fetch the queryset from the parent get_queryset
        queryset = super().get_queryset()

        # Get the q GET parameter
        q = self.request.GET.get("q")
        if q:
            # Return a filtered queryset
            return queryset.filter(title__icontains=q)
        # Return the base queryset
        return queryset
  
```

Now, instead of listing all of the flavors, we list only the flavors whose titles contain the search string.

As we mentioned, search forms are unusual in that unlike nearly every other HTML form they specify a GET request in the HTML form. This is because search forms are not changing data, but simply retrieving information from the server. The search form should look something like this:

Example 10.12: Search Snippet of HTML

```
{# templates/flavors/_flavor_search.html #}
{%
    comment %
}
Usage: {% include "flavors/_flavor_search.html" %}
{%
    endcomment %
}
<form action="{% url "flavor_list" %}" method="GET">
    <input type="text" name="q" />
    <button type="submit">search</button>
</form>
```

TIP: Specify the Form Target in Search Forms

We also take care to specify the URL in the form action, because we've found that search forms are often included in several pages. This is why we prefix them with ‘_’ and create them in such a way as to be included in other templates.

Once we get past overriding the `ListView`'s `get_queryset()` method, the rest of this example is just a simple HTML form. We like this kind of simplicity.

10.6 Using Just `django.views.generic.View`

It's entirely possible to build a project just using `django.views.generic.View` for all the views. It's not as extreme as one might think. For example, if we look at the official Django documentation's introduction to class-based views (docs.djangoproject.com/en/3.2/topics/class-based-views/intro/#using-class-based-views), we can see the approach is very close to how function-based views are written. In fact, we highlighted this two chapters ago in [Section 8.6.1: The Simplest Views](#) because it's important.

Imagine instead of writing function-based views with nested-ifs representing different HTTP methods or class-based views where the HTTP methods are hidden behind `get_context_data()` and `form_valid()` methods, they are readily accessible to developers. Imagine something like:

Example 10.13: Using the Base View Class

```

from django.contrib.auth.mixins import LoginRequiredMixin
from django.shortcuts import get_object_or_404
from django.shortcuts import render, redirect
from django.views.generic import View

from .forms import FlavorForm
from .models import Flavor

class FlavorView(LoginRequiredMixin, View):

    def get(self, request, *args, **kwargs):
        # Handles display of the Flavor object
        flavor = get_object_or_404(Flavor, slug=kwargs['slug'])
        return render(request,
                      "flavors/flavor_detail.html",
                      {"flavor": flavor})
    )

    def post(self, request, *args, **kwargs):
        # Handles updates of the Flavor object
        flavor = get_object_or_404(Flavor, slug=kwargs['slug'])
        form = FlavorForm(request.POST, instance=flavor)
        if form.is_valid():
            form.save()
        return redirect("flavors:detail", flavor.slug)

```

While we can do this in a function-based view, it can be argued that the GET/POST method declarations within the `FlavorView` are easier to read than the traditional “`if request.method == ...`” conditions. In addition, since the inheritance chain is so shallow, it means using mixins doesn’t threaten us with cognitive overload.

What we find really useful, even on projects which use a lot of generic class-based views, is using the `django.views.generic.View` class with a GET method for displaying JSON, PDF or other non-HTML content. All the tricks that we’ve used for rendering CSV, Excel, and PDF files in function-based views apply when using the GET method. For example:

Example 10.14: Using the View Class to Create PDFs

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.http import HttpResponse
from django.shortcuts import get_object_or_404
from django.views.generic import View

from .models import Flavor
from .reports import make_flavor_pdf

class FlavorPDFView(LoginRequiredMixin, View):

    def get(self, request, *args, **kwargs):
        # Get the flavor
        flavor = get_object_or_404(Flavor, slug=kwargs['slug'])

        # create the response
        response = HttpResponse(content_type='application/pdf')

        # generate the PDF stream and attach to the response
        response = make_flavor_pdf(response, flavor)

    return response
```

This is a pretty straight-forward example, but if we have to leverage more mixins and deal with more custom logic, the simplicity of `django.views.generic.View` makes it much easier than the more heavyweight views. In essence, we get all the advantages of function-based views combined with the object-oriented power that CBVs give us.

10.7 Additional Resources

- docs.djangoproject.com/en/3.2/topics/class-based-views/
- docs.djangoproject.com/en/3.2/topics/class-based-views/generic-display/
- docs.djangoproject.com/en/3.2/topics/class-based-views/generic-editing/
- docs.djangoproject.com/en/3.2/topics/class-based-views/mixins/
- docs.djangoproject.com/en/3.2/ref/class-based-views/
- The GCBV inspector at ccbv.co.uk
- python.org/download/releases/2.3/mro/ - For Python 2.3, nevertheless an excellent guide to how Python handles MRO.
- daniel.feldroy.com/tag/class-based-views.html

- ▶ spapas.github.io/2018/03/19/comprehensive-django-cbv-guide/ - Serafeim Papastefanos' lovely deep dive into Django CBVs
- ▶ djangodeconstructed.com/2020/04/27/roll-your-own-class-based-views-in-django/ - Another deep dive into CBVs, this one illustrating how to create a RESTful API with DRF

PACKAGE TIP: Other Useful CBV Libraries

- ▶ **django-extra-views** Another great CBV library, django-extra-views covers the cases that django-braces does not.
- ▶ **django-vanilla-views** A very interesting library that provides all the power of classic Django GCBVs in a vastly simplified, easier-to-use package. Works great in combination with django-braces.

10.8 Summary

This chapter covered:

- ▶ Using mixins with CBVs
- ▶ Which Django CBV should be used for which task
- ▶ General tips for CBV usage
- ▶ Connecting CBVs to forms
- ▶ Using the base `django.views.generic.View`

The next chapter explores asynchronous views. Chapter 12 explores common CBV/form patterns. Knowledge of both of these are helpful to have in your developer toolbox.

11 | Asynchronous Views

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

11.1 Notes from Analyzing Django 3.1a Pre-Release Async Views

- ▶ Don't use Django for simple reads of data to present to the user. The data will typically be fetched before HTML or JSON rendering can be performed.
- ▶ When using Class-Based Views, keep them as simple as possible. Consider inheriting from `django.views.generic.View`. The machinery underneath more complex views has proven unstable. This recommendation may change as Django's async story advances.

Example 11.1: An example of a simple update form that is a working async view

```
class AsyncViewMixin:  
    async def __call__(self):  
        return super().__call__(self)  
  
class SimpleBookUpdateView(LoginRequiredMixin, AsyncViewMixin,  
                           View):  
    def get(self, request, *args, **kwargs):  
        flavor = get_object_or_404(Flavor, slug=slug)  
        return render(request, "flavor_form.html", {"flavor":  
            flavor})
```

```
def post(self, request, *args, **kwargs):
    form = FlavorForm(request.POST)
    if form.is_valid():
        sync_to_async(form.save())
    else:
        return render({'form': form}, "flavor_form.html")
    return redirect("flavor:detail")
```

11.2 Resources

- docs.djangoproject.com/en/dev/topics/async/

12 | Common Patterns for Forms

Django forms are powerful, flexible, extensible, and robust. For this reason, the Django admin and CBVs use them extensively. In fact, all the major Django API frameworks use ModelForms or a similar implementation as part of their validation.

Combining forms, models, and views allows us to get a lot of work done for little effort. The learning curve is worth it: once you learn to work fluently with these components, you'll find that Django provides the ability to create an amazing amount of useful, stable functionality at an amazing pace.

PACKAGE TIP: Useful Form-Related Packages

- ▶ **django-floppyforms** for rendering Django inputs in HTML5.
- ▶ **django-crispy-forms** for advanced form layout controls. By default, forms are rendered with Bootstrap form elements and styles. This package plays well with django-floppyforms, so they are often used together.

This chapter goes explicitly into one of the best parts of Django: forms, models, and CBVs working in concert. This chapter covers five common form patterns that should be in every Django developer's toolbox.

12.1 Pattern 1: Simple ModelForm With Default Validators

The simplest data-changing form that we can make is a `ModelForm` using several default validators as-is, without modification. In fact, we already relied on default validators in [Section 10.5.1: Views + ModelForm Example](#).

If you recall, using `ModelForms` with CBVs to implement add/edit forms can be done in just a few lines of code:

Example 12.1: flavors/views.py

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView, UpdateView

from .models import Flavor

class FlavorCreateView(LoginRequiredMixin, CreateView):
    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']

class FlavorUpdateView(LoginRequiredMixin, UpdateView):
    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']
```

To summarize how we use default validation as-is here:

- FlavorCreateView and FlavorUpdateView are assigned Flavor as their model.
- Both views auto-generate a ModelForm based on the Flavor model.
- Those ModelForms rely on the default field validation rules of the Flavor model.

Yes, Django gives us a lot of great defaults for data validation, but in practice, the defaults are never enough. We recognize this, so as a first step, the next pattern will demonstrate how to create a custom field validator.

12.2 Pattern 2: Custom Form Field Validators in ModelForms

What if we wanted to be certain that every use of the title field across our project's dessert apps started with the word 'Tasty'?



Figure 12.1: At Tasty Research, every flavor must begin with “Tasty”.

This is a string validation problem that can be solved with a simple **custom field validator**.

In this pattern, we cover how to create custom single-field validators and demonstrate how to add them to both abstract models and forms.

Imagine for the purpose of this example that we have a project with two different dessert-related models: a `Flavor` model for ice cream flavors, and a `Milkshake` model for different types of milkshakes. Assume that both of our example models have `title` fields.

To validate all editable model titles, we start by creating a `validators.py` module:

Example 12.2: validators.py

```
# coreValidators.py
from django.core.exceptions import ValidationError

def validate_tasty(value):
    """Raise a ValidationError if the value doesn't start with the
    word 'Tasty'.
    """

```

```
if not value.startswith('Tasty'):
    msg = 'Must start with Tasty'
    raise ValidationError(msg)
```

In Django, a custom field validator is simply a callable (usually a function) that raises an error if the submitted argument doesn't pass its test.

While our `validate_tasty()` validator function just does a simple string check for the sake of example, it's good to keep in mind that form field validators can become quite complex in practice.

TIP: Test Your Validators Carefully

Since validators are critical in keeping corruption out of Django project databases, it's especially important to write detailed tests for them.

These tests should include thoughtful edge case tests for every condition related to your validators' custom logic.

In order to use our `validate_tasty()` validator function across different dessert models, we're going to first add it to an abstract model called `TastyTitleAbstractModel`, which we plan to use across our project.

Assuming that our `Flavor` and `Milkshake` models are in separate apps, it doesn't make sense to put our validator in one app or the other. Instead, we create a `core/models.py` module and place the `TastyTitleAbstractModel` there.

Example 12.3: Adding Custom Validator to a Model

```
# core/models.py
from django.db import models

from .validators import validate_tasty

class TastyTitleAbstractModel(models.Model):

    title = models.CharField(max_length=255,
                           validators=[validate_tasty])

    class Meta:
```

```
abstract = True
```

The last two lines of the above example code for `core/models.py` make `TastyTitleAbstractModel` an abstract model, which is what we want. See [Section 6.1.2: Be Careful With Model Inheritance](#).

Let's alter the original `flavors/models.py` Flavor code to use `TastyTitleAbstractModel` as the parent class:

Example 12.4: Inheriting Validators

```
# flavors/models.py
from django.db import models
from django.urls import reverse

from core.models import TastyTitleAbstractModel

class Flavor(TastyTitleAbstractModel):
    slug = models.SlugField()
    scoops_remaining = models.IntegerField(default=0)

    def get_absolute_url(self):
        return reverse('flavors:detail', kwargs={'slug':
            self.slug})
```

This works with the `Flavor` model, and it will work with any other tasty food-based model such as a `WaffleCone` or `Cake` model. Any model that inherits from the `TastyTitleAbstractModel` class will throw a validation error if anyone attempts to save a model with a title that doesn't start with 'Tasty'.

Now, let's explore a couple of questions that might be forming in your head:

- What if we wanted to use `validate_tasty()` in just forms?
- What if we wanted to assign it to other fields besides the title?

To support these behaviors, we need to create a custom `FlavorForm` that utilizes our custom field validator:

Example 12.5: Adding Custom Validators to a Model Form

```
# flavors/forms.py
from django import forms

from .models import Flavor
from core.validators import validate_tasty

class FlavorForm(forms.ModelForm):
    def __init__(self, *args, **kwargs):
        super().__init__(*args, **kwargs)
        self.fields['title'].validators.append(validate_tasty)
        self.fields['slug'].validators.append(validate_tasty)

    class Meta:
        model = Flavor
```

A nice thing about both examples of validator usage in this pattern is that we haven't had to change the `validate_tasty()` code at all. Instead, we just import and use it in new places.

Attaching the custom form to the views is our next step. The default behavior of Django model-based edit views is to auto-generate the `ModelForm` based on the view's model attribute. We are going to override that default and pass in our custom `FlavorForm`. This occurs in the `flavors/views.py` module, where we alter the create and update forms as demonstrated below:

Example 12.6: Overriding the CBV form_class Attribute

```
# flavors/views.py
from django.contrib import messages
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import CreateView, DetailView, UpdateView

from .models import Flavor
from .forms import FlavorForm

class FlavorActionMixin:

    model = Flavor
    fields = ['title', 'slug', 'scoops_remaining']
```

```

@property
def success_msg(self):
    return NotImplemented

def form_valid(self, form):
    messages.info(self.request, self.success_msg)
    return super().form_valid(form)

class FlavorCreateView(LoginRequiredMixin, FlavorActionMixin,
                      CreateView):
    success_msg = 'created'
    # Explicitly attach the FlavorForm class
    form_class = FlavorForm

class FlavorUpdateView(LoginRequiredMixin, FlavorActionMixin,
                      UpdateView):
    success_msg = 'updated'
    # Explicitly attach the FlavorForm class
    form_class = FlavorForm

class FlavorDetailView(DetailView):
    model = Flavor

```

The `FlavorCreateView` and `FlavorUpdateView` views now use the new `FlavorForm` to validate incoming data.

Note that with these modifications, the `Flavor` model can either be identical to the one at the start of this chapter, or it can be an altered one that inherits from `TastyTitleAbstractModel`.

12.3 Pattern 3: Overriding the Clean Stage of Validation

Let's discuss some interesting validation use cases:

- ▶ Multi-field validation
- ▶ Validation involving existing data from the database that has already been validated

Both of these are great scenarios for overriding the `clean()` and `clean_<field_name>()` methods with custom validation logic.

After the default and custom field validators are run, Django provides a second stage and process for validating incoming data, this time via the `clean()` method and

`clean_<field_name>()` methods. You might wonder why Django provides more hooks for validation, so here are our two favorite arguments:

- ① The `clean()` method is the place to validate two or more fields against each other, since it's not specific to any one particular field.
- ② The clean validation stage is a better place to attach validation against persistent data. Since the data already has some validation, you won't waste as many database cycles on needless queries.

Let's explore this with another validation example. Perhaps we want to implement an ice cream ordering form, where users could specify the flavor desired, add toppings, and then come to our store and pick them up.

Since we want to prevent users from ordering flavors that are out of stock, we'll put in a `clean_slug()` method. With our flavor validation, our form might look like:

Example 12.7: Custom `clean_slug()` Method

```
# flavors/forms.py
from django import forms

from flavors.models import Flavor

class IceCreamOrderForm(forms.Form):
    """Normally done with forms.ModelForm. But we use forms.Form
    here
    to demonstrate that these sorts of techniques work on every
    type of form.
    """
    slug = forms.ChoiceField(label='Flavor')
    toppings = forms.CharField()

    def __init__(self, *args, **kwargs):
        super().__init__(*args, **kwargs)
        # We dynamically set the choices here rather than
        # in the flavor field definition. Setting them in
        # the field definition means status updates won't
        # be reflected in the form without server restarts.
        self.fields['slug'].choices = [
            (x.slug, x.title) for x in Flavor.objects.all()
        ]
        # NOTE: We could filter by whether or not a flavor
```

```

#      has any scoops, but this is an example of
#      how to use clean_slug, not filter().

def clean_slug(self):
    slug = self.cleaned_data['slug']
    if Flavor.objects.get(slug=slug).scoops_remaining <= 0:
        msg = 'Sorry, we are out of that flavor.'
        raise forms.ValidationError(msg)
    return slug

```

For HTML-powered views, the `clean_slug()` method in our example, upon throwing an error, will attach a “Sorry, we are out of that flavor” message to the flavor HTML input field. This is a great shortcut for writing HTML forms!

Now imagine if we get common customer complaints about orders with too much chocolate. Yes, it’s silly and quite impossible, but we’re just using ‘too much chocolate’ as a completely mythical example for the sake of making a point.

In any case, let’s use the `clean()` method to validate the flavor and toppings fields against each other.

Example 12.8: Custom clean() Form Method

```

# attach this code to the previous example (12.7)
def clean(self):
    cleaned_data = super().clean()
    slug = cleaned_data.get('slug', '')
    toppings = cleaned_data.get('toppings', '')

    # Silly "too much chocolate" validation example
    in_slug = 'chocolate' in slug.lower()
    in_toppings = 'chocolate' in toppings.lower()
    if in_slug and in_toppings:
        msg = 'Your order has too much chocolate.'
        raise forms.ValidationError(msg)
    return cleaned_data

```

There we go, an implementation against the impossible condition of too much chocolate!

TIP: Common Fields Used in Multi-Field Validation

It is common practice for user account forms involved with email and password entry to force the user to enter the same data twice. Other things to check for against those fields include:

- Strength of the submitted password.
- If the email model field isn't set to unique=True, whether or not the email is unique.

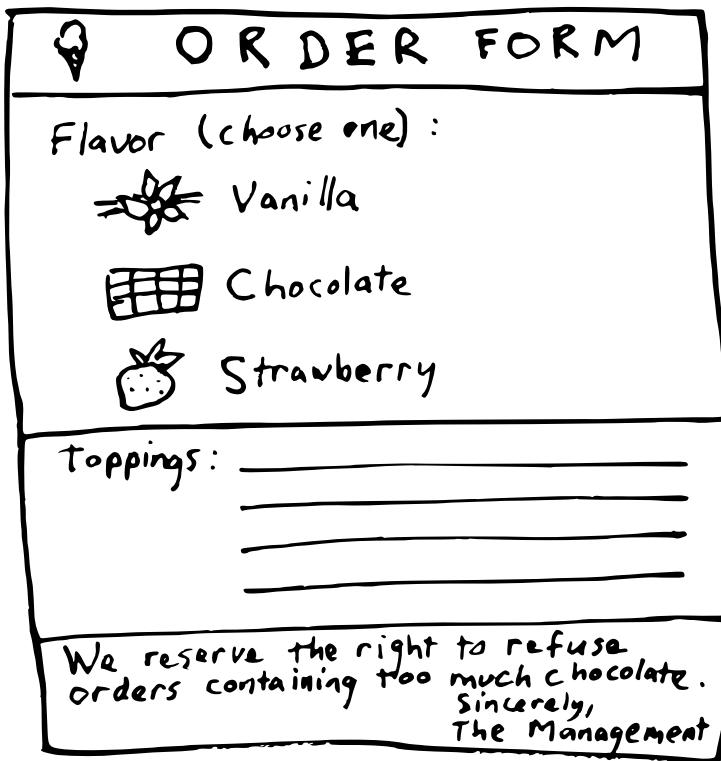


Figure 12.2: Why would they do this to us?

12.4 Pattern 4: Hacking Form Fields

(2 CBVs, 2 Forms, 1 Model)

This is where we start to get fancy. We're going to cover a situation where two views/forms correspond to one model. We'll hack Django forms to produce a form with custom behavior.

It's not uncommon to have users create a record that contains a few empty fields which need additional data later. An example might be a list of stores, where we want each store entered into the system as fast as possible, but want to add more data such as phone number and

description later. Here's our IceCreamStore model:

Example 12.9: IceCreamStore Model

```
# stores/models.py
from django.db import models
from django.urls import reverse

class IceCreamStore(models.Model):
    title = models.CharField(max_length=100)
    block_address = models.TextField()
    phone = models.CharField(max_length=20, blank=True)
    description = models.TextField(blank=True)

    def get_absolute_url(self):
        return reverse('stores:store_detail', kwargs={'pk':
            self.pk})
```

The default `ModelForm` for this model forces the user to enter the `title` and `block_address` field but allows the user to skip the `phone` and `description` fields. That's great for initial data entry, but as mentioned earlier, we want to have future updates of the data to require the `phone` and `description` fields.

The way we implemented this in the past before we began to delve into their construction was to override the `phone` and `description` fields in the edit form. This resulted in heavily-duplicated code that looked like this:

Example 12.10: Repeated Heavily Duplicated Code

```
# stores/forms.py
from django import forms

from .models import IceCreamStore

class IceCreamStoreUpdateForm(forms.ModelForm):
    # Don't do this! Duplication of the model field!
    phone = forms.CharField(required=True)
    # Don't do this! Duplication of the model field!
    description = forms.TextField(required=True)

    class Meta:
```

```
model = IceCreamStore
```

This form should look very familiar. Why is that?

Well, we're nearly copying the `IceCreamStore` model!

This is just a simple example, but when dealing with a lot of fields on a model, the duplication becomes extremely challenging to manage. In fact, what tends to happen is copy-pasting of code from models right into forms, which is a gross violation of **Don't Repeat Yourself**.

Want to know how gross? Using the above approach, if we add a simple `help_text` attribute to the `description` field in the model, it will not show up in the template until we also modify the `description` field definition in the form. If that sounds confusing, that's because it is.

A better way is to rely on a useful little detail that's good to remember about Django forms: instantiated form objects store fields in a dict-like attribute called `fields`.

Instead of copy-pasting field definitions from models to forms, we can simply modify existing attributes on specified fields in the `__init__()` method of the `ModelForm`:

Example 12.11: Overriding Init to Modify Existing Field Attributes

```
# stores/forms.py
# Call phone and description from the self.fields dict-like object
from django import forms

from .models import IceCreamStore

class IceCreamStoreUpdateForm(forms.ModelForm):

    class Meta:
        model = IceCreamStore

    def __init__(self, *args, **kwargs):
        # Call the original __init__ method before assigning
        # field overloads
        super().__init__(*args, **kwargs)
        self.fields['phone'].required = True
        self.fields['description'].required = True
```

This improved approach allows us to stop copy-pasting code and instead focus on just the field-specific settings.

An important point to remember is that when it comes down to it, Django forms are just Python classes. They get instantiated as objects, they can inherit from other classes, and they can act as superclasses.

Therefore, we can rely on inheritance to trim the line count in our ice cream store forms:

Example 12.12: Using Inheritance to Clean Up Forms

```
# stores/forms.py
from django import forms

from .models import IceCreamStore

class IceCreamStoreCreateForm(forms.ModelForm):

    class Meta:
        model = IceCreamStore
        fields = ['title', 'block_address', ]

class IceCreamStoreUpdateForm(IceCreamStoreCreateForm):

    def __init__(self, *args, **kwargs):
        super().__init__(*args, **kwargs)
        self.fields['phone'].required = True
        self.fields['description'].required = True

    class Meta(IceCreamStoreCreateForm.Meta):
        # show all the fields!
        fields = ['title', 'block_address', 'phone',
                  'description', ]
```

WARNING: Use `Meta.fields` and Never Use `Meta.exclude`

We use `Meta.fields` instead of `Meta.exclude` so that we know exactly what fields we are exposing. See [Section 28.14: Don't Use ModelForms.Meta.exclude](#).

Finally, now we have what we need to define the corresponding CBVs. We've got our form classes, so let's use them in the `IceCreamStore` create and update views:

Example 12.13: Revised Create and Update Views

```
# stores/views.py
from django.views.generic import CreateView, UpdateView

from .forms import IceCreamStoreCreateForm, IceCreamStoreUpdateForm
from .models import IceCreamStore

class IceCreamCreateView(CreateView):
    model = IceCreamStore
    form_class = IceCreamStoreCreateForm

class IceCreamUpdateView(UpdateView):
    model = IceCreamStore
    form_class = IceCreamStoreUpdateForm
```

We now have two views and two forms that work with one model.

12.5 Pattern 5: Reusable Search Mixin View

In this example, we're going to cover how to reuse a search form in two views that correspond to two different models.

Assume that both models have a field called `title` (this pattern also demonstrates why naming standards in projects is a good thing). This example will demonstrate how a single CBV can be used to provide simple search functionality on both the `Flavor` and `IceCreamStore` models.

We'll start by creating a simple search mixin for our view:

Example 12.14: TitleSearchMixin a simple search class

```
# core/views.py
class TitleSearchMixin:

    def get_queryset(self):
        # Fetch the queryset from the parent's get_queryset
        queryset = super().get_queryset()

        # Get the q GET parameter
        q = self.request.GET.get('q')
        if q:
```

```

# return a filtered queryset
return queryset.filter(title__icontains=q)
# No q is specified so we return queryset
return queryset

```

The above code should look very familiar as we used it almost verbatim in the Forms + View example. Here's how you make it work with both the `Flavor` and `IceCreamStore` views. First the flavor view:

Example 12.15: Adding TitleSearchMixin to FlavorListView

```

# add to flavors/views.py
from django.views.generic import ListView

from .models import Flavor
from core.views import TitleSearchMixin

class FlavorListView(TitleSearchMixin, ListView):
    model = Flavor

```

And we'll add it to the ice cream store views:

Example 12.16: Adding TitleSearchMixin to IceCreamStoreListView

```

# add to stores/views.py
from django.views.generic import ListView

from .models import Store
from core.views import TitleSearchMixin

class IceCreamStoreListView(TitleSearchMixin, ListView):
    model = Store

```

As for the form? We just define it in HTML for each `ListView`:

Example 12.17: Snippet from stores/store_list.html

```

{# form to go into stores/store_list.html template #}
<form action="" method="GET">
    <input type="text" name="q" />

```

```
<button type="submit">search</button>
</form>
```

and

Example 12.18: Snippet from flavors/flavor_list.html

```
{# form to go into flavors/flavor_list.html template #}
<form action="" method="GET">
    <input type="text" name="q" />
    <button type="submit">search</button>
</form>
```

Now we have the same mixin in both views. Mixins are a good way to reuse code, but using too many mixins in a single class makes for very hard-to-maintain code. As always, try to keep your code as simple as possible.

12.6 Summary

We began this chapter with the simplest form pattern, using a `ModelForm`, CBV, and default validators. We iterated on that with an example of a custom validator.

Next, we explored more complex validation. We covered an example overriding the `clean` methods. We also closely examined a scenario involving two views and their corresponding forms that were tied to a single model.

Finally, we covered an example of creating a reusable search mixin to add the same form to two different apps.

13 | Form Fundamentals

- 100% of Django projects should use Forms.
- 95% of Django projects should use ModelForms.
- 91% of all Django projects use ModelForms.
- 80% of ModelForms require trivial logic.
- 20% of ModelForms require complicated logic.

– Daniel’s made-up statistics™

Django’s forms are really powerful, and knowing how to use them anytime data is coming from outside your application is part of keeping your data clean.

There are edge cases that can cause a bit of anguish. If you understand the structure of how forms are composed and how to call them, most edge cases can be readily overcome.

The most important thing to remember about Django forms is they should be used to validate all incoming data.

13.1 Validate All Incoming Data With Django Forms

Django’s forms are a wonderful framework designed to validate Python dictionaries. While most of the time we use them to validate incoming HTTP requests containing POST, there is nothing limiting them to be used just in this manner.

For example, let’s say we have a Django app that updates its model via CSV files fetched from another project. To handle this sort of thing, it’s not uncommon to see code like this (albeit in not as simplistic an example):

Example 13.1: How Not to Import CSV

```
import csv

from django.utils.six import StringIO

from .models import Purchase

def add_csv_purchases(rows):

    rows = StringIO.StringIO(rows)
    records_added = 0

        # Generate a dict per row, with the first CSV row being the keys
    for row in csv.DictReader(rows, delimiter=','):
        # DON'T DO THIS: Tossing unvalidated data into your model.
        Purchase.objects.create(**row)
        records_added += 1

    return records_added
```

In fact, what you don't see is that we're not checking to see if sellers, stored as a string in the Purchase model, are actually valid sellers. We could add validation code to our `add_csv_purchases()` function, but let's face it, keeping complex validation code understandable as requirements and data changes over time is hard.

A better approach is to validate the incoming data with a Django Form like so:

Example 13.2: How to Safely Import CSV

```
import csv

from django.utils.six import StringIO

from django import forms

from .models import Purchase, Seller

class PurchaseForm(forms.ModelForm):

    class Meta:
```

```

model = Purchase

def clean_seller(self):
    seller = self.cleaned_data['seller']
    try:
        Seller.objects.get(name=seller)
    except Seller.DoesNotExist:
        msg = '{0} does not exist in purchase #{1}.'.format(
            seller,
            self.cleaned_data['purchase_number'])
    )
    raise forms.ValidationError(msg)
return seller

def add_csv_purchases(rows):

    rows = StringIO.StringIO(rows)

    records_added = 0
    errors = []
    # Generate a dict per row, with the first CSV row being the
    # keys.
    for row in csv.DictReader(rows, delimiter=','):

        # Bind the row data to the PurchaseForm.
        form = PurchaseForm(row)
        # Check to see if the row data is valid.
        if form.is_valid():
            # Row data is valid so save the record.
            form.save()
            records_added += 1
        else:
            errors.append(form.errors)

    return records_added, errors

```

What's really nice about this practice is that rather than cooking up our own validation system for incoming data, we're using the well-proven data testing framework built into Django.

TIP: What About the code parameter?

Arnaud Limbourg pointed out that the official Django docs recommend passing a code parameter to `ValidationError` as follows:

```
forms.ValidationError(_('Invalid value'), code='invalid')
```

In our example we don't include one, but you can use it in your code if you want.

Django core developer Marc Tamlyn says, “On a personal note, I feel that Django’s docs are maybe a little heavy handed with recommending the use of code as a best practice everywhere, although it should be encouraged in third party applications. It is however definitely the best practice for any situation where you wish to check the nature of the errors - it’s much better than checking the message of the validation error as this is subject to copy changes.”

Reference:

- ▶ docs.djangoproject.com/en/3.2/ref/forms/validation/#raising-validationerror

13.2 Use the POST Method in HTML Forms

Every HTML form that alters data must submit its data via the POST method:

Example 13.3: How to Use POST in HTML

```
<form action="{% url 'flavor_add' %}" method="POST">
```

The only exception you'll ever see to using POST in forms is with search forms, which typically submit queries that don't result in any alteration of data. Search forms that are idempotent should use the GET method.

13.3 Always Use CSRF Protection With HTTP Forms That Modify Data

Django comes with cross-site request forgery protection (CSRF) built in, and usage of it is introduced in Part 4 of the Django introductory tutorial. It's easy to use, and Django even throws a friendly warning during development when you forget to use it. This is a critical security issue, and here and in our security chapter we recommend always using Django's CSRF protection capabilities.

In our experience, the time when CSRF protection isn't used is when creating machine-accessible APIs authenticated by proven libraries such as github.com/jazzband/

[dj-rest-auth](#). Tools like this, when combined with Django REST Framework do this for you. Since API requests should be signed/authenticated on a per-request basis, this means relying on HTTP cookies for authentication isn't realistic. Therefore, CSRF isn't always a problem when using these frameworks.

If you are writing an API from scratch that accepts data changes, it's a good idea to become familiar with Django's CSRF documentation at

docs.djangoproject.com/en/3.2/ref/csrf/.

TIP: HTML Search Forms

Since HTML search forms don't change data, they use the HTTP GET method and do not trigger Django's CSRF protection.

You should use Django's `CsrfViewMiddleware` as blanket protection across your site rather than manually decorating views with `csrf_protect`. To ensure that CSRF works in Jinja2 templates, see [Section 16.3: Considerations When Using Jinja With Django](#).

13.3.1 Posting Data via AJAX

You should use Django's CSRF protection even when posting data via AJAX. Do not make your AJAX views CSRF-exempt.

Instead, when posting via AJAX, you'll need to set an HTTP header called **X-CSRFToken**.

The official Django documentation includes a snippet that shows how to set this header for only POST requests, in conjunction with jQuery 1.5.1 or higher's cross-domain checking: docs.djangoproject.com/en/3.2/ref/csrf/#ajax

See this and more at [Section 19.3.5: AJAX and the CSRF Token](#).

13.4 Understand How to Add Django Form Instance Attributes

Sometimes in the `clean()`, `clean_FOO()` or `save()` methods of a Django form, we need to have additional form instance attributes available. A sample case for this is having the `request.user` object available. Here is a simple taster-driven example.

First, here is the form:

Example 13.4: Taster Form

```
from django import forms

from .models import Taster

class TasterForm(forms.ModelForm):

    class Meta:
        model = Taster

    def __init__(self, *args, **kwargs):
        # set the user as an attribute of the form
        self.user = kwargs.pop('user')
        super().__init__(*args, **kwargs)
```

See how we set `self.user` before calling `super()`, and extract it from `kwargs`? Pointed out to us by Christopher Lambacher, this makes our form more robust, especially when using multiple inheritance. Then, here is the view:

Example 13.5: Taster Update View

```
from django.contrib.auth.mixins import LoginRequiredMixin
from django.views.generic import UpdateView

from .forms import TasterForm
from .models import Taster

class TasterUpdateView(LoginRequiredMixin, UpdateView):
    model = Taster
    form_class = TasterForm
    success_url = '/someplace/'

    def get_form_kwargs(self):
        """This method is what injects forms with keyword
        → arguments."""
        # grab the current set of form #kwargs
        kwargs = super().get_form_kwargs()
        # Update the kwargs with the user_id
        kwargs['user'] = self.request.user
        return kwargs
```

PACKAGE TIP: django-braces's ModelForm Mixins

Inserting the `request.user` object into forms is so frequently done that **django-braces** can do it for us. Nevertheless, knowing how it works is useful for when what you need to add is not the `request.user` object.

- django-braces.readthedocs.io/en/latest/form.html#userformkwargsmixin
- django-braces.readthedocs.io/en/latest/form.html#userkwargmodelformmixin

13.5 Know How Form Validation Works

Form validation is one of those areas of Django where knowing the inner workings will drastically improve your code. Let's take a moment to dig into form validation and cover some of the key points.

When you call `form.is_valid()`, a lot of things happen behind the scenes. The following things occur according to this workflow:

- ❶ If the form has bound data, `form.is_valid()` calls the `form.full_clean()` method.
- ❷ `form.full_clean()` iterates through the form fields and each field validates itself:
 - ❶ Data coming into the field is coerced into Python via the `to_python()` method or raises a `ValidationError`.
 - ❷ Data is validated against field-specific rules, including custom validators. Failure raises a `ValidationError`.
 - ❸ If there are any custom `clean_<field>()` methods in the form, they are called at this time.
- ❸ `form.full_clean()` executes the `form.clean()` method.
- ❹ If it's a `ModelForm` instance, `form._post_clean()` does the following:
 - ❶ Sets `ModelForm` data to the `Model` instance, regardless of whether `form.is_valid()` is True or False.
 - ❷ Calls the model's `clean()` method. For reference, saving a model instance through the ORM does not call the model's `clean()` method.

If this seems complicated, just remember that it gets simpler in practice, and that all of this functionality lets us really understand what's going on with incoming data. The example in the next section should help to explain this further.



Figure 13.1: When ice cream validation fails.

13.5.1 ModelForm Data Is Saved to the Form, Then the Model Instance

We like to call this the *WHAT?!?* of form validation. At first glance, form data being set to the form instance might seem like a bug. But it's not a bug. It's intended behavior.

In a `ModelForm`, form data is saved in two distinct steps:

- ① First, form data is saved to the form instance.
- ② Later, form data is saved to the model instance.

Since `ModelForms` don't save to the model instance until they are activated by the `form.save()` method, we can take advantage of this separation as a useful feature.

For example, perhaps you need to catch the details of failed submission attempts for a form, saving both the user-supplied form data as well as the intended model instance changes.

A simple, perhaps simplistic, way of capturing that data is as follows. First, we create a form failure history model in `core/models.py` as shown on the next page:

Example 13.6: Form Failure History Model

```
# core/models.py
from django.db import models

class ModelFormFailureHistory(models.Model):
    form_data = models.TextField()
    model_data = models.TextField()
```

Second, we add the following to the `FlavorActionMixin` in `flavors/views.py`:

Example 13.7: FlavorActionMixin

```
# flavors/views.py
import json

from django.contrib import messages
from django.core import serializers

from core.models import ModelFormFailureHistory

class FlavorActionMixin:

    @property
    def success_msg(self):
        return NotImplemented

    def form_valid(self, form):
        messages.info(self.request, self.success_msg)
        return super().form_valid(form)

    def form_invalid(self, form):
        """Save invalid form and model data for later reference."""
        form_data = json.dumps(form.cleaned_data)
        # Serialize the form.instance
        model_data = serializers.serialize('json', [form.instance])
        # Strip away leading and ending bracket leaving only a dict
        model_data = model_data[1:-1]
        ModelFormFailureHistory.objects.create(
            form_data=form_data,
            model_data=model_data
        )
        return super().form_invalid(form)
```

If you recall, `form_invalid()` is called after failed validation of a form with bad data. When it is called here in this example, both the cleaned form data and the final data saved to the database are saved as a `ModelFormFailureHistory` record.

13.6 Add Errors to Forms With Form.add_error()

Shared with us by Michael Barr, we can streamline `Form.clean()` with the `Form.add_error()` method.

Example 13.8: Using Form.add_error

```
from django import forms

class IceCreamReviewForm(forms.Form):
    # Rest of tester form goes here
    ...

    def clean(self):
        cleaned_data = super().clean()
        flavor = cleaned_data.get('flavor')
        age = cleaned_data.get('age')

        if flavor == 'coffee' and age < 3:
            # Record errors that will be displayed later.
            msg = 'Coffee Ice Cream is not for Babies.'
            self.add_error('flavor', msg)
            self.add_error('age', msg)

        # Always return the full collection of cleaned data.
        return cleaned_data
```

13.6.1 Other Useful Form Methods

Here are other form validation methods worth exploring:

- docs.djangoproject.com/en/3.2/ref/forms/api/#django.forms.Form.errors.as_data
- docs.djangoproject.com/en/3.2/ref/forms/api/#django.forms.Form.errors.as_json
- docs.djangoproject.com/en/3.2/ref/forms/api/#django.forms.Form.non_field_errors

13.7 Fields Without Pre-Made Widgets

Two of the new `django.contrib.postgres` fields, `ArrayField` and `HStoreField`, don't work well with existing Django HTML fields. They don't come with corresponding widgets at all. Nevertheless, you should still be using forms with these fields.

As in the previous section this topic is covered in [Section 13.1: Validate All Incoming Data With Django Forms](#).

13.8 Customizing Widgets

One of our favorite features about modern Django is how trivial it is to override the HTML of Django widgets or even create custom widgets. Here's our general advice:

- ▶ As always, keep it simple! Stay focused on presentation, nothing more.
- ▶ No widgets should ever change data. They are meant purely for display.
- ▶ Follow the Django pattern and put all custom widgets into modules called `widgets.py`.

13.8.1 Overriding the HTML of Built-In Widgets

This technique is useful for integrating tools like Bootstrap, Zurb, and other responsive front-end frameworks. On the downside, overriding the default templates in this manner means that *every form element* will use these alterations. To override these templates, you need to make the following changes to `settings.py`:

Example 13.9: Overriding Django Form Widget HTML

```
# settings.py
FORM_RENDERER = 'django.forms.renderers.TemplatesSetting'

INSTALLED_APPS = [
    ...
    'django.forms',
    ...
]
```

Once that's complete, create a directory inside your `templates` directory and start overriding templates. If you want to know which templates can be overridden, you can look inside Django's source code at github.com/django/django/tree/master/django/forms/templates/django/forms/widgets

More information:

- ▶ docs.djangoproject.com/en/3.2/ref/forms/renderers/#overriding-built-in-widget-templates
- ▶ docs.djangoproject.com/en/3.2/ref/forms/renderers/#templatesetting

13.8.2 Creating New Custom Widgets

If we want finer control of widgets, perhaps limiting the changes to certain data types, then it's time to delve into creating custom widgets of our own. To do this:

- ① Go to <https://github.com/django/django/blob/master/django/forms/widgets.py> and select the widget closest to what you want.
- ② Extend the widget to behave as you would like. Keep changes to a minimum!

Here's an example:

Example 13.10: Creating an Ice Cream Widget

```
# flavors/widgets.py
from django.forms.widgets import TextInput

class IceCreamFlavorInput(TextInput):
    """Ice cream flavors must always end with 'Ice Cream'"""

    def get_context(self, name, value, attrs):
        context = super().get_context(name, value, attrs)
        value = context['widget']['value']
        if not value.strip().lower().endswith('ice cream'):
            context['widget']['value'] = '{} Ice
                                      {} Cream'.format(value)
        return context
```

While this example is silly, it illustrates how to extend an existing widget to serve our purpose. Please note the following:

- All the widget does is modify how the value is displayed.
- The widget does not validate or modify the data coming back from the browser. That's the job of forms and models respectively.
- We extended the absolute bare minimum of `django.forms.widgets.TextInput` to make it work.

13.9 Additional Resources

- Classy Django Forms is an API inspector with detailed descriptions of all the elements of Django's form system. df.9vo.lt/
- Matt Layman's deep dive into forms is great reading: mattlayman.com/understand-django/user-interaction-forms
- Author Daniel Roy Greenfeld's blog series on forms expands upon concepts touched in this book daniel.feldroy.com/tag/forms.html
- Brad Montgomery's article on how to create a widget for the `ArrayField`. bradmontgomery.net/blog/2015/04/25/nice-arrayfield-widgets-choices-and-chosenjs/

- ▶ Rendering custom Django widgets docs.djangoproject.com/en/3.2/ref/forms/renderers/

13.10 Summary

Once you dig into forms, keep yourself focused on clarity of code and testability. Forms are one of the primary validation tools in your Django project, an important defense against attacks and accidental data corruption.

In the next chapter we'll dig into using templates.

14 | Templates: Best Practices

One of Django's early design decisions was to limit the functionality of the template language. This heavily constrains what can be done with Django templates, which we often think is a very good thing since it forces us to keep business logic in the Python side of things.

Think about it: the limitations of Django templates force us to put the most critical, complex and detailed parts of our project into .py files rather than into template files. Python happens to be one of the most clear, concise, and elegant programming languages on the planet, so why would we want things any other way?

TIP: Using Jinja2 With Django

Since the release of 1.8, Django has natively supported Jinja2. It also provides an interface for including other template languages. We cover this topic in [Chapter 16: Django Templates and Jinja2](#).

14.1 Keep Templates Mostly in `templates/`

In our projects, we keep the majority of our templates in the main ‘templates/’ directory. We put subdirectories in ‘templates/’ to correspond to each of our apps, as shown here:

Example 14.1: How We Structure Our Templates Directories

```
templates/
├── base.html
├── ... (other sitewide templates in here)
└── freezers/
    └── ("freezers" app templates in here)
```

However, some tutorials advocate putting templates within a subdirectory of each app. We find that the extra nesting is a pain to deal with, as shown here:

Example 14.2: Overly Complex Template Directory Structure

```
freezers/
├── templates/
│   ├── freezers/
│   │   ├── ...
│   │   └── ... ("freezers" app templates in here)
└── templates/
    ├── base.html
    └── ...
        └── ... (other sitewide templates in here)
```

That said, some people like to do it the second way, and that's alright.

The exception to all of this is when we work with Django apps that are installed as pluggable packages. A Django package usually contains its own in-app ‘templates’ directory. Then we override those templates anyway from our project’s main ‘templates’ directory in order to add design and styling. We’ll explore this in [Section 23.9: Releasing Your Own Django Packages](#)

14.2 Template Architecture Patterns

We’ve found that for our purposes, simple 2-tier or 3-tier template architectures are ideal. The difference in tiers is how many levels of template extending needs to occur before content in apps is displayed. See the examples below:

14.2.1 2-Tier Template Architecture Example

With a 2-tier template architecture, all templates inherit from a single root *base.html* file.

Example 14.3: 2-Tier Template Architecture

```
templates/
├── base.html
├── dashboard.html # extends base.html
└── profiles/
    ├── profile_detail.html # extends base.html
    └── profile_form.html # extends base.html
```

This is best for sites with a consistent overall layout from app to app.

14.2.2 3-Tier Template Architecture Example

With a 3-tier template architecture:

- Each app has a `base_<app_name>.html` template. App-level base templates share a common parent `base.html` template.
- Templates within apps share a common parent `base_<app_name>.html` template.
- Any template at the same level as `base.html` inherits `base.html`.

Example 14.4: 3-Tier Template Architecture

```
templates/
  base.html
  dashboard.html # extends base.html
profiles/
  base_profiles.html # extends base.html
  profile_detail.html # extends base_profiles.html
  profile_form.html # extends base_profiles.html
```

The 3-tier architecture is best for websites where each section requires a distinctive layout. For example, a news site might have a local news section, a classified ads section, and an events section. Each of these sections requires its own custom layout.

This is extremely useful when we want HTML to look or behave differently for a particular section of the site that groups functionality.

14.2.3 Flat Is Better Than Nested



Figure 14.1: An excerpt from the Zen of Ice Cream.

Complex template hierarchies make it exceedingly difficult to debug, modify, and extend HTML pages and tie in CSS styles. When template block layouts become unnecessarily nested, you end up digging through file after file just to change, say, the width of a box.

Giving your template blocks as shallow an inheritance structure as possible will make your templates easier to work with and more maintainable. If you’re working with a designer, your designer will thank you.

That being said, there’s a difference between excessively-complex template block hierarchies and templates that use blocks wisely for code reuse. When you have large, multi-line chunks of the same or very similar code in separate templates, refactoring that code into reusable blocks will make your code more maintainable.

The *Zen of Python* includes the aphorism “*Flat is better than nested*” for good reason. Each level of nesting adds mental overhead. Keep that in mind when architecting your Django templates.

TIP: The Zen of Python

At the command line, do the following:

```
python -c 'import this'
```

What you’ll see is the *Zen of Python*, an eloquently-expressed set of guiding principles for the design of the Python programming language.

14.3 Limit Processing in Templates

The less processing you try to do in your templates, the better. This is particularly a problem when it comes to queries and iteration performed in the template layer.

Whenever you iterate over a queryset in a template, ask yourself the following questions:

- ① How large is the queryset? Looping over gigantic querysets in your templates is almost always a bad idea.
- ② How large are the objects being retrieved? Are all the fields needed in this template?
- ③ During each iteration of the loop, how much processing occurs?

If any warning bells go off in your head, then there’s probably a better way to rewrite your template code.

WARNING: Why Not Just Cache?

Sometimes you can just cache away your template inefficiencies. That’s fine, but before you cache, you should first try to attack the root of the problem.

You can save yourself a lot of work by mentally tracing through your template code,

doing some quick run time analysis, and refactoring.

Let's now explore some examples of template code that can be rewritten more efficiently.

Suspend your disbelief for a moment and pretend that the nutty duo behind Two Scoops ran a 30-second commercial during the Super Bowl. "Free pints of ice cream for the first million developers who request them! All you have to do is fill out a form to get a voucher redeemable in stores!"

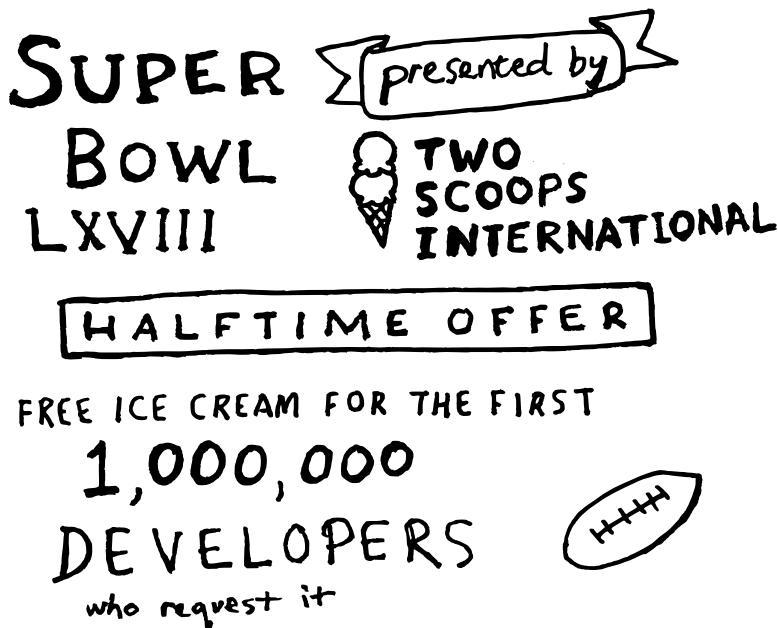


Figure 14.2: Two Scoops, official halftime sponsor of the Super Bowl.

Naturally, we have a "vouchers" app to track the names and email addresses of everyone who requested a free pint voucher. Here's what the model for this app looks like:

Example 14.5: Voucher Model Example

```
# vouchers/models.py
from django.db import models

from .managers import VoucherManager

class Voucher(models.Model):
```

```
"""Vouchers for free pints of ice cream."""
name = models.CharField(max_length=100)
email = models.EmailField()
address = models.TextField()
birth_date = models.DateField(blank=True)
sent = models.DateTimeField(null=True, default=None)
redeemed = models.DateTimeField(null=True, default=None)

objects = VoucherManager()
```

This model will be used in the following examples to illustrate a few “gotchas” that you should avoid.

14.3.1 Gotcha 1: Aggregation in Templates

Since we have birth date information, it would be interesting to display a rough breakdown by age range of voucher requests and redemptions.

A very bad way to implement this would be to do all the processing at the template level. To be more specific in the context of this example:

- Don’t iterate over the entire voucher list in your template’s JavaScript section, using JavaScript variables to hold age range counts.
- Don’t use the add template filter to sum up the voucher counts.

Those implementations are ways of getting around Django’s limitations of logic in templates, but they’ll slow down your pages drastically.

The better way is to move this processing out of your template and into your Python code. Sticking to our minimal approach of using templates only to *display* data that has already been processed, our template looks like this:

Example 14.6: Using Templates to Display Pre-Processed Data

```
{# templates/vouchers/ages.html #}
{% extends "base.html" %}

{% block content %}


||
||
||


```

```

<th>Age Bracket</th>
<th>Number of Vouchers Issued</th>
</tr>
</thead>
<tbody>
  {% for age_bracket in age_brackets %}
  <tr>
    <td>{{ age_bracket.title }}</td>
    <td>{{ age_bracket.count }}</td>
  </tr>
  {% endfor %}
</tbody>
</table>
{% endblock content %}

```

In this example, we can do the processing with a model manager, using the Django ORM's aggregation methods and the handy *dateutil* library described in [Chapter 37: Appendix A: Packages Mentioned In This Book](#):

Example 14.7: Pre-Processing Data Before Template Display

```

# vouchers/managers.py
from django.db import models
from django.utils import timezone

from dateutil.relativedelta import relativedelta

class VoucherManager(models.Manager):
    def age_breakdown(self):
        """Returns a dict of age brackets/counts."""
        age_brackets = []
        delta = timezone.now() - relativedelta(years=18)
        count =
            self.model.objects.filter(birth_date__gt=delta).count()
        age_brackets.append(
            {'title': '0-17', 'count': count})
        count =
            self.model.objects.filter(birth_date__lte=delta).count()
        age_brackets.append(

```

```
        {'title': '18+', 'count': count}
    )
return age_brackets
```

This method would be called from a view, and the results would be passed to the template as a context variable.

14.3.2 Gotcha 2: Filtering With Conditionals in Templates

Suppose we want to display a list of all the Greenfelds and the Roys who requested free pint vouchers, so that we could invite them to our family reunion. We want to filter our records on the name field. A very bad way to implement this would be with giant loops and if statements at the template level.

Example 14.8: Disastrous Method of Filtering Data

```
<h2>Greenfelds Who Want Ice Cream</h2>
<ul>
  {% for voucher in voucher_list %}
    {%# Don't do this: conditional filtering in templates %}
    {% if 'greenfeld' in voucher.name.lower %}
      <li>{{ voucher.name }}</li>
    {% endif %}
  {% endfor %}
</ul>

<h2>Roys Who Want Ice Cream</h2>
<ul>
  {% for voucher in voucher_list %}
    {%# Don't do this: conditional filtering in templates %}
    {% if 'roy' in voucher.name.lower %}
      <li>{{ voucher.name }}</li>
    {% endif %}
  {% endfor %}
</ul>
```

In this bad snippet, we're looping and checking for various "if" conditions. That's filtering a potentially gigantic list of records in templates, which is not designed for this kind of work, and will cause performance bottlenecks. On the other hand, databases like PostgreSQL

and MySQL are great at filtering records, so this should be done at the database layer. The Django ORM can help us with this as demonstrated in the next example.

Example 14.9: Using the ORM/Database to Filter Data

```
# vouchers/views.py
from django.views.generic import TemplateView

from .models import Voucher

class GreenfeldRoyView(TemplateView):
    template_name = 'vouchers/views_conditional.html'

    def get_context_data(self, **kwargs):
        context = super().get_context_data(**kwargs)
        context['greenfields'] = \
            Voucher.objects.filter(name__icontains='greenfeld')
        context['roys'] = \
            Voucher.objects.filter(name__icontains='roy')
        return context
```

Then to call the results, we use the following, simpler template:

Example 14.10: Simplified Fast Template Display

```
<h2>Greenfelds Who Want Ice Cream</h2>
<ul>
  {% for voucher in greenfields %}
    <li>{{ voucher.name }}</li>
  {% endfor %}
</ul>

<h2>Roys Who Want Ice Cream</h2>
<ul>
  {% for voucher in roys %}
    <li>{{ voucher.name }}</li>
  {% endfor %}
</ul>
```

It's easy to speed up this template by moving the filtering to a view. With this change, we now simply use the template to display the already-filtered data. The above template now follows our preferred minimalist approach.

14.3.3 Gotcha 3: Complex Implied Queries in Templates

Despite the limitations on logic allowed in Django templates, it's all too easy to find ourselves calling unnecessary queries repeatedly in a view. For example, if we list users of our site and all their flavors this way:

Example 14.11: Template Code Generating Extra Queries

```
{# list generated via User.objects.all() #}
<h1>Ice Cream Fans and their favorite flavors.</h1>
<ul>
  {% for user in user_list %}
    <li>
      {{ user.name }}:
        {# DON'T DO THIS: Generated implicit query per user #}
        {{ user.flavor.title }}
        {# DON'T DO THIS: Second implicit query per user!!! #}
        {{ user.flavor.scoops_remaining }}
    </li>
  {% endfor %}
</ul>
```

Then calling each user generates a second query. While that might not seem like much, we are certain that if we had enough users and made this mistake frequently enough, our site would have a lot of trouble.

One quick correction is to use the Django ORM's `select_related()` method:

Example 14.12: Data Queried with select_related

```
{% comment %}
List generated via User.objects.all().select_related('flavor')
{% endcomment %}
<h1>Ice Cream Fans and their favorite flavors.</h1>
<ul>
  {% for user in user_list %}
    <li>
      {{ user.name }}:
        {{ user.flavor.title }}
        {{ user.flavor.scoops_remaining }}
    </li>
  {% endfor %}
</ul>
```

```
</ul>
```

One more thing: If you've embraced using model methods, the same applies. Be cautious putting too much query logic in the model methods called from templates.

14.3.4 Gotcha 4: Hidden CPU Load in Templates

Watch out for innocent-looking calls in templates that result in intensive CPU processing. Although a template might look simple and contain very little code, a single line could be invoking an object method that does a lot of processing.

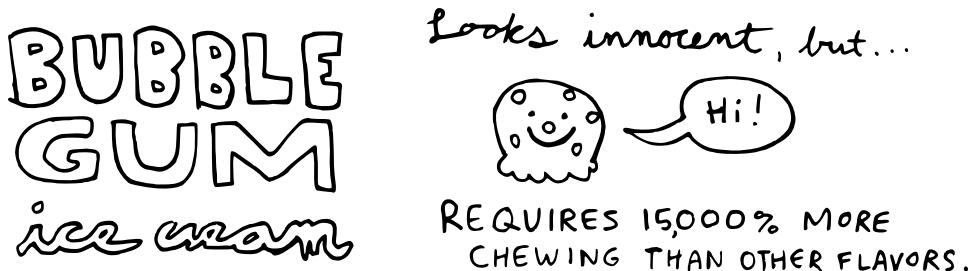


Figure 14.3: Bubble gum ice cream looks easy to eat but requires a lot of processing.

Common examples are template tags that manipulate images, such as the template tags provided by libraries like **sorl-thumbnail**. In many cases tools like this work great, but we've had some issues. Specifically, the manipulation and the saving of image data to file systems (often across networks) inside a template means there is a choke point within templates.

This is why projects that handle a lot of image or data processing increase the performance of their site by taking the image processing out of templates and into views, models, helper methods, or asynchronous messages queues like Celery or Django Channels.

14.3.5 Gotcha 5: Hidden REST API Calls in Templates

You saw in the previous gotcha how easy it is to introduce template loading delays by accessing object method calls. This is true not just with high-load methods, but also with methods that contain REST API calls. A good example is querying an unfortunately slow maps API hosted by a third-party service that your project absolutely requires. Don't do this in the template code by calling a method attached to an object passed into the view's context.

Where should actual REST API consumption occur? We recommend doing this in:

- JavaScript code so after your project serves out its content, the client's browser handles the work. This way you can entertain or distract the client while they wait for data to load.
- The view's Python code where slow processes might be handled in a variety of ways including message queues, additional threads, multiprocesses, or more.

14.4 Don't Bother Making Your Generated HTML Pretty

Bluntly put, no one cares if the HTML generated by your Django project is attractive. In fact, if someone were to look at your rendered HTML, they'd do so through the lens of a browser inspector, which would realign the HTML spacing anyway. Therefore, if you shuffle up the code in your Django templates to render pretty HTML, you are wasting time obfuscating your code for an audience of yourself.

And yet, we've seen code like the following. This evil code snippet generates nicely formatted HTML but itself is an illegible, unmaintainable template mess:

Example 14.13: Obfuscating Template Code to Produce Pretty HTML Code

```
{% comment %}Don't do this! This code bunches everything  
together to generate pretty HTML.  
{% endcomment %}  
{% if list_type=='unordered' %}<ul>{% else %}<ol>{% endif %}{% for  
syrup in syrup_list %}<li class="{{ syrup.temperature_type|roomtemp  
}}"><a href="{% url 'syrup_detail' syrup.slug %}">{{ syrup.title }}  
</a></li>{% endfor %}{% if list_type=='unordered' %}</ul>{% else %}  
<ol>{% endif %}
```

A better way of writing the above snippet is to use indentation and one operation per line to create a readable, maintainable template:

Example 14.14: Understandable Template Code

```
{# Use indentation/comments to ensure code quality #}  
#{ start of list elements #}  
{% if list_type=='unordered' %}  
    <ul>  
        {% else %}  
            <ol>  
        {% endif %}  
  
        {% for syrup in syrup_list %}
```

```

<li class="{{ syrup.temperature_type|roomtemp }}>
    <a href="#"><% url 'syrup_detail' syrup.slug %}>
        {% syrup.title %}
    </a>
</li>
{%
    endfor
}
{# end of list elements #}
{%
    if list_type=='unordered' %
}
</ul>
{%
    else %
}
</ol>
{%
    endif
}

```

Are you worried about the volume of whitespace generated? Don't be. First of all, experienced developers favor readability of code over obfuscation for the sake of optimization. Second, there are compression and minification tools that can help more than anything you can do manually here. See [Chapter 26: Finding and Reducing Bottlenecks](#) for more details.

14.5 Exploring Template Inheritance

Let's begin with a simple *base.html* file that we'll inherit from another template:

Example 14.15: A Base HTML File

```

{# simple base.html #-}
{%
    load staticfiles
}
<html>
<head>
    <title>
        {% block title %}Two Scoops of Django{% endblock title %}
    </title>
    {% block stylesheets %}
        <link rel="stylesheet" type="text/css"
            href="#"><% static 'css/project.css' %}>
    {% endblock stylesheets %}
</head>
<body>
    <div class="content">
        {% block content %}
            <h1>Two Scoops</h1>
        {% endblock content %}

```

```
</div>
</body>
</html>
```

The `base.html` file contains the following features:

- ▶ A `title` block containing “Two Scoops of Django”.
- ▶ A `stylesheets` block containing a link to a `project.css` file used across our site.
- ▶ A `content` block containing “`<h1>Two Scoops</h1>`”.

Our example relies on just three template tags, which are summarized below:

Template Tag	Purpose
<code>{% load %}</code>	Loads the staticfiles built-in template tag library
<code>{% block %}</code>	Since <code>base.html</code> is a parent template, these define which child blocks can be filled in by child templates. We place links and scripts inside them so we can override if necessary.
<code>{% static %}</code>	Resolves the named static media argument to the static media server.

Table 14.1: Template Tags in `base.html`

To demonstrate `base.html` in use, we'll have a simple `about.html` inherit the following from it:

- ▶ A custom title.
- ▶ The original stylesheet and an additional stylesheet.
- ▶ The original header, a sub header, and paragraph content.
- ▶ The use of child blocks.
- ▶ The use of the `{{ block.super }}` template variable.

Example 14.16: Extending From `base.html`

```
{% extends "base.html" %}
{% load staticfiles %}
{% block title %}About Audrey and Daniel{% endblock title %}
{% block stylesheets %}
```

```

{{ block.super }}
<link rel="stylesheet" type="text/css"
      href="{% static 'css/about.css' %}">
{% endblock stylesheets %}
{% block content %}
{{ block.super }}
<h2>About Audrey and Daniel</h2>
<p>They enjoy eating ice cream</p>
{% endblock content %}

```

When we render this template in a view, it generates the following HTML:

Example 14.17: Rendered HTML

```

<html>
<head>
<title>
    About Audrey and Daniel
</title>
<link rel="stylesheet" type="text/css"
      href="/static/css/project.css">
<link rel="stylesheet" type="text/css"
      href="/static/css/about.css">
</head>
<body>
<div class="content">
    <h1>Two Scoops</h1>
    <h2>About Audrey and Daniel</h2>
    <p>They enjoy eating ice cream</p>
</div>
</body>
</html>

```

Notice how the rendered HTML has our custom title, the additional stylesheet link, and more material in the body? We'll use the table below to review the template tags and variables in the *about.html* template.

Note that the `{% block %}` tag is used differently in *about.html* than in *base.html*, serving to override content. In blocks where we want to preserve the *base.html* content, we use `{{ block.super }}` variable to display the content from the parent block. This brings us to the next topic, `{{ block.super }}`.

Template Object	Purpose
{% extends %}	Informs Django that about.html is inheriting or extending from base.html
{% block %}	Since about.html is a child template, block overrides the content provided by base.html. This means our title will render as <title>Audrey and Daniel</title>.
{{ block.super }}	When placed in a child template's block, it ensures that the parent's content is also included in the block. In the content block of the about.html template, this will render <h1>Two Scoops</h1>.

Table 14.2: Template Objects in about.html

14.6 block.super Gives the Power of Control

Let's imagine that we have a template which inherits everything from the *base.html* but replaces the project's link to the *project.css* file with a link to *dashboard.css*. This use case might occur when you have a project with one design for normal users, and a dashboard with a different design for staff.

If we aren't using {{ block.super }}, this often involves writing a whole new base file, often named something like *base_dashboard.html*. For better or for worse, we now have two template architectures to maintain.

If we are using {{ block.super }}, we don't need a second (or third or fourth) base template. Assuming all templates extend from *base.html* we use {{ block.super }} to assume control of our templates. Here are three examples:

Template using both *project.css* and a custom link:

Example 14.18: Using Base CSS And Custom CSS Link

```
{% extends "base.html" %}  
{% block stylesheets %}  
    {{ block.super }} #{ this brings in project.css #}  
    <link rel="stylesheet" type="text/css"  
          href="{% static 'css/custom.css' %}" />  
{% endblock stylesheets %}
```

Dashboard template that excludes the *project.css* link:

Example 14.19: Excluding the Base CSS

```
{% extends "base.html" %}
{% block stylesheets %}
<link rel="stylesheet" type="text/css"
      href="{% static 'css/dashboard.css' %}" />
{% comment %}
    By not using {{ block.super }}, this block overrides the
    stylesheet block of base.html
{% endcomment %}
{% endblock stylesheets %}
```

Template just linking the *project.css* file:

Example 14.20: Using the Base CSS File

```
{% extends "base.html" %}
{% comment %}
    By not using {% block stylesheets %}, this template inherits the
    stylesheets block from the base.html parent, in this case the
    default project.css link.
{% endcomment %}
```

These three examples demonstrate the amount of control that `{{ block.super }}` provides. The variable serves a good way to reduce template complexity, but can take a little bit of effort to fully comprehend.

TIP: `block.super` Is Similar but Not the Same as `super()`

For those coming from an object oriented programming background, it might help to think of the behavior of the `{{ block.super }}` variable to be like a very limited version of the Python built-in function, `super()`. In essence, the `block.super` variable and the `super()` function both provide access to the parent.

Just remember that they aren't the same. It's just a nice mnemonic that some developers might find useful.

14.7 Useful Things to Consider

The following are a series of smaller things we keep in mind during template development.

14.7.1 Avoid Coupling Styles Too Tightly to Python Code

Aim to control the styling of all rendered templates entirely via CSS and JS.

Use CSS for styling whenever possible. Never hardcode things like menu bar widths and color choices into your Python code. Avoid even putting that type of styling into your Django templates.

Here are some tips:

- ▶ If you have magic constants in your Python code that are entirely related to visual design layout, you should probably move them to a CSS file.
- ▶ The same applies to JavaScript.

14.7.2 Common Conventions

Here are some naming and style conventions that we recommend:

- ▶ We prefer underscores over dashes in template names, block names, and other names in templates. Most Django users seem to follow this convention. Why? Well, because underscores are allowed in names of Python objects but dashes are forbidden.
- ▶ We rely on clear, intuitive names for blocks. `{% block javascript %}` is good.
- ▶ We include the name of the block tag in the `endblock`. Never write just `{% endblock %}`, include the whole `{% endblock javascript %}`.
- ▶ Templates called by other templates are prefixed with `'_'`. This applies to templates called via `{% include %}` or custom template tags. It does not apply to templates inheritance controls such as `{% extends %}` or `{% block %}`.

14.7.3 Use Implicit and Named Explicit Context Objects Properly

When you use generic display CBVs, you have the option of using the generic `{{ object_list }}` and `{{ object }}` in your template. Another option is to use the ones that are named after your model.

For example, if you have a `Topping` model, you can use `{{ topping_list }}` and `{{ topping }}` in your templates, instead of `{{ object_list }}` and `{{ object }}`. This means both of the following template examples will work:

Example 14.21: Implicit and Explicit Context Objects

```
# templates/toppings/topping_list.html #
# Using implicit names, good for code reuse #
```

```

<ol>
  {% for object in object_list %}
    <li>{{ object }} </li>
  {% endfor %}
</ol>

  # Using explicit names, good for object specific code #
<ol>
  {% for topping in topping_list %}
    <li>{{ topping }} </li>
  {% endfor %}
</ol>

```

14.7.4 Use URL Names Instead of Hardcoded Paths

A common developer mistake is to hardcode URLs in templates like this:

Example 14.22: Hardcoded URL in Template. Sad!

```
<a href="/flavors/">
```

The problem with this is that if the URL patterns of the site need to change, all the URLs across the site need to be addressed. This impacts HTML, JavaScript, and even RESTful APIs.

Instead, we use the `{% url %}` tag and references the names in our **URLConf** files:

Example 14.23: Using the URL Tag

```
<a href="{% url 'flavors:list' %}">
```

14.7.5 Debugging Complex Templates

A trick recommended by Lennart Regebro is that when templates are complex and it becomes difficult to determine where a variable is failing, you can force more verbose errors through the use of the `string_if_invalid` option in `OPTIONS` of your `TEMPLATES` setting:

Example 14.24: Using the string_if_invalid Option

```
# settings/local.py
TEMPLATES = [
{
    'BACKEND':
        'django.template.backends.djangoproject.DjangoTemplates',
    'APP_DIRS': True,
    'OPTIONS': {
        'string_if_invalid': 'INVALID EXPRESSION: %s'
    }
},
]
```

14.8 Error Page Templates

Even the most tested and analyzed site will have a few problems now and then, and that's okay. The problem lies in how you handle those errors. The last thing that you want to do is show an ugly response or a blank web server page back to the end user.

It's standard practice to create at least *404.html* and *500.html* templates. See the GitHub HTML Styleguide link at the end of this section for other types of error pages that you may want to consider.

We suggest serving your error pages from a static file server (e.g. Nginx or Apache) as entirely self-contained static HTML files. That way, if your entire Django site goes down but your static file server is still up, then your error pages can still be served.

If you're on a PaaS, check the documentation on error pages. For example, Heroku allows users to upload a custom static HTML page to be used for 500 errors.

WARNING: Resist the Temptation to Overcomplicate Your Error Pages

Interesting or amusing error pages can be a draw to your site, but don't get carried away. It's embarrassing when your 404 page has a broken layout or your 500 page can't load the CSS and JavaScript. Worse yet is dynamic 500 error pages that break in the event of a database failure.

GitHub's 500 error page is a good example of fancy but an entirely static, self-contained error page. View the source of github.com/500 to see that:

- All CSS styles are inline in the head of the same HTML page, eliminating the need for a separate stylesheet.
- All images are entirely contained as data within the HTML page. There are no `` links to external URLs.
- All JavaScript needed for the page is contained within the HTML page. There are no external links to JavaScript assets.

For more information, see the Github HTML Styleguide:

- github.com/styleguide

14.9 Follow a Minimalist Approach

We recommend taking a minimalist approach to your template code. Treat the so-called limitations of Django templates as a blessing in disguise. Use those constraints as inspiration to find simple, elegant ways to put more of your business logic into Python code rather than into templates.

Taking a minimalist approach to templates also makes it much easier to adapt your Django apps to changing format types. When your templates are bulky and full of nested looping, complex conditionals, and data processing, it becomes harder to reuse business logic code in templates, not to mention impossible to use the same business logic in template-less views such as API views. Structuring your Django apps for code reuse is especially important as we move forward into the era of increased API development, since APIs and web pages often need to expose identical data with different formatting.

To this day, HTML remains a standard expression of content, providing the practices and patterns for this chapter.

14.10 Summary

In this chapter, we covered the following:

- Template inheritance, including the use of `{{ block.super }}`.
- Writing legible, maintainable templates.
- Easy methods to optimize template performance.
- Issues with limitations of template processing.
- Error page templates.
- Many other helpful little details about templates.

In the next chapter we'll examine template tags and filters.

15 | Template Tags and Filters

Django provides dozens of default template tags and filters, all of which share the following common traits:

- ▶ All of the defaults have clear, intuitive names.
- ▶ All of the defaults do just one thing.
- ▶ None of the defaults alter any sort of persistent data.

These traits serve as very good best practices when you have to write your own template tags. Let's now dive a bit deeper into practices and recommendations when writing custom filters and template tags.

15.1 Filters Are Functions

Filters are functions that accept just one or two arguments, and that don't give developers the ability to add behavior controls in Django templates.

We feel that this simplicity makes filters less prone to abuse, since they are essentially just functions with decorators that make Python usable inside of Django templates. This means that they can be called as normal functions (although we prefer to have our filters call functions imported from utility modules).

In fact, a quick scan of the source code of Django's default filters at [/git.io/vyzx0](https://git.io/vyzx0) shows that the `slugify()` template filter simply calls the `djangotools.text.slugify` function.

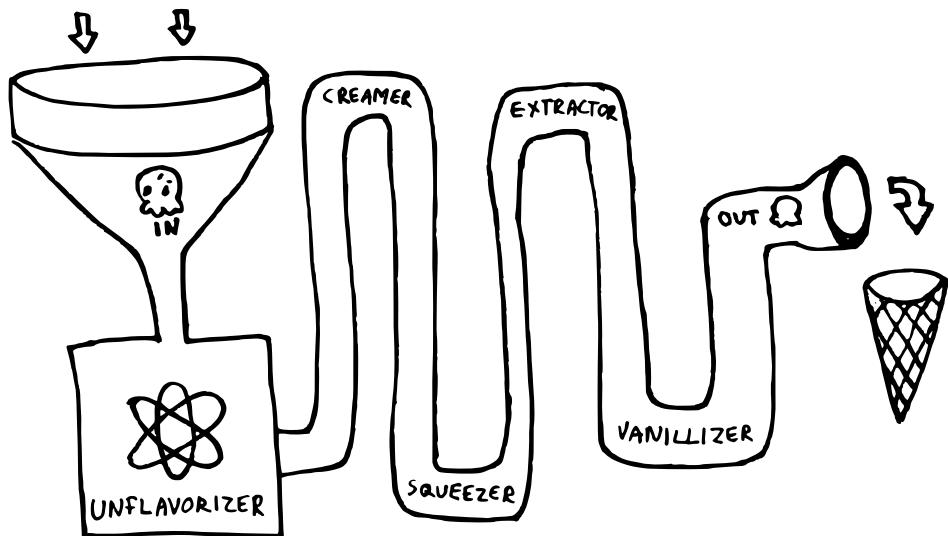


Figure 15.1: This filter transforms 1-2 flavors of ice cream into vanilla, outputting to a cone.

15.1.1 Filters Are Easy to Test

Testing a filter is just a matter of testing a function, which we cover in [Chapter 24: Testing Stinks and Is a Waste of Money!](#).

15.1.2 Filters and Code Reuse

As can be seen in the Django source code [defaultfilter.py](https://github.com/django/django/blob/stable/3.0.x/django/template/defaultfilters.py) github.com/django/django/blob/stable/3.0.x/django/template/defaultfilters.py, most of the filter logic is imported from other libraries. For example, it's not necessary to import `django.template.defaultfilters.slugify`. Instead we can use `django.utils.text.slugify`. While it might seem to be perfectly acceptable to import the filter, it adds a level of code abstraction that can make debugging a problem a little more difficult.

Since filters are just functions, we advocate that anything but the simplest logic for them be moved to more reusable utility functions, perhaps stored in a `utils.py` module. Doing this makes it easier to introspect code bases and test, and can mean dramatically fewer imports. Over time core Django has followed this pattern more and more.

15.1.3 When to Write Filters

Filters are good for modifying the presentation of data, and they can be readily reused in REST APIs and other output formats. Being constrained to two arguments limits the functionality so it's harder (but not impossible) to make them unbearably complex.

15.2 Custom Template Tags

“Please stop writing so many template tags. They are a pain to debug.”

– Audrey Roy Greenfeld, while debugging Daniel Roy Greenfeld’s code.

While template tags are great tools when developers have the discipline to keep them in check, in practice they tend to get abused. This section covers the problems that you run into when you put too much of your logic into template tags and filters.

15.2.1 Template Tags Are Harder to Debug

Template tags of any complexity can be challenging to debug. When they include opening and closing elements, they become even harder to handle. We’ve found liberal use of log statements and tests are very helpful when they become hard to inspect and correct.

15.2.2 Template Tags Make Code Reuse Harder

It can be difficult to consistently apply the same effect as a template tag on alternative output formats used by REST APIs, RSS feeds, or in PDF/CSV generation. If you do need to generate alternate formats, it’s worth considering putting all logic for template tags into `utils.py`, for easy access from other views.

15.2.3 The Performance Cost of Template Tags

Template tags can have a significant performance cost, especially when they load other templates. While templates run much faster than they did in pre-1.8 versions of Django, it’s easy to lose those performance benefits if you don’t have a deep understanding of how templates are loaded in Django.

If your custom template tags are loading a lot of templates, you might want to consider caching the loaded templates. See docs.djangoproject.com/en/3.2/ref/templates/api/#django.template.loaders.cached.Loader for more details.

15.2.4 When to Write Template Tags

These days, we’re very cautious about adding new template tags. We consider two things before writing them:

- ▶ Anything that causes a read/write of data might be better placed in a model or object method.

- Since we implement a consistent naming standard across our projects, we can add an abstract base class model to our `core.models` module. Can a method or property in our project's abstract base class model do the same work as a custom template tag?

When should you write new template tags? We recommend writing them in situations where they are only responsible for rendering of HTML. For example, projects with very complex HTML layouts with many different models or data types might use them to create a more flexible, understandable template architecture.

PACKAGE TIP: We Do Use Custom Template Tags

It sounds like we stay away from custom template tags, but that's not the case. We're just cautious. Interestingly enough, Daniel has been involved with at least three prominent libraries that make extensive use of template tags.

- `django-crispy-forms`
- `django-uni-form` (deprecated, use `django-crispy-forms` instead)
- `django-wysiwyg` (deprecated)

15.3 Naming Your Template Tag Libraries

The convention we follow is `<app_name>_tags.py`. Using the `twoscoops` example, we would have files named thus:

- `flavors_tags.py`
- `blog_tags.py`
- `events_tags.py`
- `tickets_tags.py`

This makes determining the source of a template tag library trivial to discover.

TIP: Don't Name Your Template Tag Libraries With the Same Name as Your App

For example, naming the `events` app's templatetag library `events.py` is problematic. It used to be that doing so would cause all sorts of problems because of the way that Django loaded template tags. While that's been fixed, the convention of adding a `_tags.py` suffix to template tag libraries has remained. This means it's easy for everyone to find template tag libraries.

WARNING: Don't Use Your IDE's Features as an Excuse to Obfuscate Your Code

Do not rely on your text editor or IDE's powers of introspection to determine the name of your template tag library.

15.4 Loading Your Template Tag Modules

In your template, right after `{% extends "base.html" %}` (or any other parent template besides `base.html`) is where you load your template tags:

Example 15.1: The Right Way To Load A Template Tag Library

```
{% extends "base.html" %}

{% load flavors_tags %}
```

Simplicity itself! Explicit loading of functionality! Hooray!

15.4.1 Watch Out for This Anti-Pattern

Unfortunately, there is an anti-pattern that will drive you mad with fury each and every time you encounter it:

Example 15.2: Implicit Loading of Template Tag Libraries

```
# settings/base.py
TEMPLATES = [
    'BACKEND': 'django.template.backends.django.DjangoTemplates',
    'OPTIONS': {
        # Don't do this!
        # It's an evil anti-pattern!
        'builtins': ['flavors.templatetags.flavors_tags'],
    },
]
```

The anti-pattern replaces the explicit `load` method described above with an implicit behavior which supposedly fixes a “Don’t Repeat Yourself” (DRY) issue. However, any DRY “improvements” it creates are destroyed by the following:

- It will add some overhead due to the fact this literally loads the template tag library into each and every template loaded by `django.template.Template`. This means

every inherited template, template `{% include %}`, `inclusion_tag`, and more will be impacted. While we have cautioned against premature optimization, we are also not in favor of adding this much unneeded extra computational work into our code when better alternatives exist.

- Because the template tag library is implicitly loaded, it immensely adds to the difficulty in introspection and debugging. Per the **Zen of Python**, “Explicit is better than Implicit.”

Fortunately, this is obscure because beginning Django developers don’t know enough to make this mistake and experienced Django developers get annoyed when they have to deal with it.

15.5 Summary

It is our contention that template tags and filters should concern themselves only with the manipulation of presentable data. So long as we remember this when we write or use them, our projects run faster and are easier to maintain.

In the next chapter we explore the use of Django templates and Jinja2.

16 | Django Templates and Jinja2

With Django 1.8 came support for multiple template engines. As of now, the only available built-in backends for the Django template system are the **Django template language (DTL)** and **Jinja2**.

16.1 What's the Syntactical Difference?

At the syntax level, DTL and Jinja2 are very similar. In fact, Jinja2 was inspired by DTL. Here are the most significant syntax differences:

Subject	DTL	Jinja2
Method Calls	<code>{{ user.getFavorites() }}</code>	<code>{{ user.getFavorites() }}</code>
Filter Arguments	<code>{{ toppings join:',' }}</code>	<code>{{ toppings join(',') }}</code>
Loop Empty Argument	<code>{% empty %}</code>	<code>{% else %}</code>
Loop Variable	<code>{% forloop %}</code>	<code>{% loop %}</code>
Cycle	<code>{% cycle 'odd' 'even' %}</code>	<code>{% loop.cycle('odd', 'even') %}</code>

Table 16.1: DTL vs Jinja2 Syntax Differences

16.2 Should I Switch?

First off, when using Django we don't have to choose between DTL or Jinja2. We can set `settings.TEMPLATES` to use DTL for some template directories and Jinja2 for others. If we have a lot of templates in our codebase, we can hold onto our existing templates and leverage the benefits of Jinja2 where we need it. This allows for the best of both worlds: Access to the vast Django ecosystem of third-party packages and the features of alternatives to DTL.

In short, we can use multiple template languages together harmoniously.

For example, most of a site can be rendered using DTL, with the larger pages rendered content done with Jinja2. A good example of this behavior are the djangopackages.org/

grids. Because of their size and complexity, in the future these pages may be refactored to be powered by Jinja2 rather than DTL (unless the project becomes a single page app (SPA)).

16.2.1 Advantages of DTL

Here are reasons to use the Django template language:

- ▶ It's batteries-included with all the functionality clearly documented within the Django docs. The official Django documentation on DTL is very extensive and easy to follow. The template code examples in the Django docs use DTL.
- ▶ Most third-party Django packages use DTL. Converting them to Jinja2 is extra work.
- ▶ Converting a large codebase from DTL to Jinja2 is a lot of work.

16.2.2 Advantages of Jinja2

Here are reasons to use Jinja2:

- ▶ Can be used independently of Django.
- ▶ As Jinja2's syntax is closer to Python's syntax, many find it more intuitive.
- ▶ Jinja2 is generally more explicit, e.g. function calls in the template use parentheses.
- ▶ Jinja2 has less arbitrary restrictions on logic, e.g. you can pass unlimited arguments to a filter with Jinja2 vs. only 1 argument with DTL.
- ▶ According to benchmarks online and our own experiments, Jinja2 is faster. That said, templates are always a much smaller performance bottleneck than database optimization. See [Chapter 26: Finding and Reducing Bottlenecks](#).

16.2.3 Which One Wins?

It depends on your situation:

- ▶ New users should always stick with DTL.
- ▶ Existing projects with large codebases will want to stick with DTL except for those few pages that need performance improvements.
- ▶ Experienced Djangonauts should try both, weigh the benefits of DTL and Jinja, and make their own decision.

TIP: Choose a Primary Template Language

While we can mix multiple template languages across a project, doing so risks adding dramatically to the mental overload of a project. To mitigate this risk, choose a single, primary template language.

16.3 Considerations When Using Jinja With Django

Here are some things to keep in mind when using Jinja templates with Django:

16.3.1 CSRF and Jinja

Jinja accesses Django's **CSRF** mechanism differently than DTL. To incorporate CSRF into Jinja2 templates, when rendering forms make certain to include the necessary HTML:

Example 16.1: Using Django's CSRF Token with Jinja2 Templates

```
<div style="display:none">
    <input type="hidden" name="csrfmiddlewaretoken" value="{{ csrf_token }}>
</div>
```

16.3.2 Using Template Tags in Jinja Templates

At this time using Django-style Template Tags isn't possible in Jinja. If we need the functionality of a particular template tag, depending on what we're trying to do we convert it using one of these techniques:

- ▶ Convert the functionality into a function.
- ▶ Create a Jinja Extension. See jinja.palletsprojects.com/en/latest/extensions/#module-jinja2.ext

16.3.3 Using Django-Style Template Filters in Jinja Templates

One thing we've grown used to having around in DTL is Django's default template filters. Fortunately, as Django filters are just functions (see [Section 15.1: Filters Are Functions](#)), we can easily specify a custom Jinja2 environment that includes the template filters:

Example 16.2: Injecting Django Filters Into Jinja2 Templates

```
# core/jinja2.py
from django.contrib.staticfiles.storage import staticfiles_storage
from django.template import defaultfilters
from django.urls import reverse

from jinja2 import Environment

def environment(**options):
```

```
env = Environment(**options)
env.globals.update({
    'static': staticfiles_storage.url,
    'url': reverse,
    'dj': defaultfilters
})
return env
```

Here is a an example of using Django template filters as functions in a Jinja2 template:

Example 16.3: Using Django Filters in a Jinja2 Template

```
<table><tbody>
  {% for purchase in purchase_list %}
    <tr>
      <a href="{{ url('purchase:detail', pk=purchase.pk) }}">
        {{ purchase.title }}
      </a>
    </tr>
    <tr>{{ dj.date(purchase.created, 'SHORT_DATE_FORMAT') }}</tr>
    <tr>{{ dj.floatformat(purchase.amount, 2) }}</tr>
  {% endfor %}
</tbody></table>
```

If you want a less global approach, we can use a technique explored in [Section 10.4.3: Performing Custom Actions on Views With Invalid Forms](#). Here we create a mixin for attaching the Django template filters as an attribute on views:

Example 16.4: Django Filter View Mixin for Jinja2

```
# core/mixins.py
from django.template import defaultfilters

class DjFilterMixin:
    dj = defaultfilters
```

If a view inherits from our `core.mixins.DjFilterMixin` class, in its Jinja2 template we can do the following:

Example 16.5: Using View-Injected Django Filters in Jinja2

```
<table><tbody>
{%
  for purchase in purchase_list %}
    <tr>
      <a href="{{ url('purchase:detail', pk=purchase.pk) }}">
        {{ purchase.title }}
      </a>
    </tr>
    <!-- Call the django.template.defaultfilters functions from the
    view --&gt;
    &lt;tr&gt;{{ view.dj.date(purchase.created, 'SHORT_DATE_FORMAT') }}&lt;/tr&gt;
    &lt;tr&gt;{{ view.dj.floatformat(purchase.amount, 2) }}&lt;/tr&gt;
{%
  endfor %}
&lt;/tbody&gt;&lt;/table&gt;</pre>

```

TIP: Avoid Using Context Processors With Jinja2

The Django documentation recommends against using context processors with Jinja2. See the warning box at docs.djangoproject.com/en/3.2/topics/templates/#django.template.backends.jinja2.Jinja2. What they recommend instead is passing a function to the template that can be called as needed. This can be done on a per-view basis or by injecting the callable function as described in this subsection.

16.3.4 The Jinja2 Environment Object Should Be Considered Static

In example 15.1 we demonstrate the use of the core component of Jinja2, the `jinja2.Environment` class. This object is where Jinja2 shares configuration, filters, tests, globals, and more. When the first template in your project is loaded, Jinja2 instantiates this class as what is essentially a static object.

Example:

Example 16.6: Static Nature of Jinja2 Environment

```
# core/jinja2.py
from jinja2 import Environment

import random
```

```
def environment(**options):
    env = Environment(**options)
    env.globals.update({
        # Runs only on the first template load! The three displays
        # below
        # will all present the same number.
        # {{ random_once }} {{ random_once }} {{ random_once }}
        'random_once': random.randint(1, 5)
        # Can be called repeated as a function in templates. Each
        # call
        # returns a random number:
        # {{ random() }} {{ random() }} {{ random() }}
        'random': lambda: random.randint(1, 5),
    })
    return env
```

WARNING: Don't Alter `jinja.Environment` After Instantiation

While possible, modifying the `jinja.Environment` object is dangerous. Per the Jinja2 API documentation, “Modifications on environments after the first template was loaded will lead to surprising effects and undefined behavior.”

Reference: jinja.palletsprojects.com/en/3.0.x/api/#jinja2.Environment

16.4 Resources

- Django's documentation on using Jinja2: docs.djangoproject.com/en/3.2/topics/templates/#django.template.backends.jinja2.Jinja2
- jinja.pocoo.org

16.5 Summary

In this chapter we covered the similarities and differences between DTL and Jinja2. We also explored some of the ramifications and workarounds for using Jinja2 in projects.

Starting in the next chapter we leave templates behind and explore the world of REST from both the server and client sides.

17 | Building REST APIs With Django REST Framework

Today's internet is much more than HTML-powered websites. Developers need to support web clients, native mobile apps, and business-to-business applications . Having tools that support easy creation of **JSON**, **YAML**, **XML**, and other formats is important. By design, a **Representational State Transfer (REST) Application Programming Interface (API)** exposes application data to other concerns.

The defacto package for building these REST APIs with Django is **Django REST Framework** (DRF). In fact, DRF has become so ubiquitous it's not uncommon to hear questions like, "What's the difference between Django and Django REST Framework"? Since approximately 2013, we estimate 90-95% of new Django projects with an API use DRF.

Why the popularity? Well, we feel that the success of Django REST Framework is because:

- DRF leans heavily on object-oriented design and is designed to be easily extensible.
- DRF builds directly off of Django CBVs. If you understand CBVs, DRF's design feels like an understandable extension of Django.
- It comes with a host of views for API generation, ranging from the `django.views.generic.View`-like `APIView` to deep abstractions like generic API views and viewsets.
- The serializer system is extremely powerful, but can be trivially ignored or replaced.
- Authentication and Authorization are covered in a powerful, extendable way.
- If you really want to use FBVs for your API, DRF has you covered there too.

Because of these reasons, DRF's community is gigantic. This is important, because it means that many of the challenges in building REST APIs with it have been solved. Perhaps not in DRF directly, but in third-party packages. Also, finding people who know it and can answer questions isn't hard.

We'll go over the new paradigm of APIs in [Chapter 18: Building GraphQL APIs With Django](#).

If you don't know how to use DRF yet, we recommend its official tutorials:

- django-rest-framework.org/tutorial/quickstart/
- django-rest-framework.org/tutorial/1-serialization/

TIP: Django REST Framework Needs Your Support!

DRF is a collaboratively funded project. If you use it commercially we strongly encourage you to invest in its continued development by signing up for a paid plan. Thanks to this funding, we've seen the project leap forward in terms of functionality.

Financial contributions start at US\$15 and go up. At the higher levels, the DRF project even provides priority support: fund.djangoproject.com/topics/funding/

17.1 Fundamentals of Basic REST API Design

Let's take a step back and look at HTTP and how it interacts with Django REST Framework.

The Hypertext Transfer Protocol (HTTP) is a protocol for distributing content that provides a set of methods to declare actions. By convention, REST APIs rely on these methods, so use the appropriate HTTP method for each type of action:

Purpose of Request	HTTP Method	Rough SQL equivalent
Create a new resource	POST	INSERT
Read an existing resource	GET	SELECT
Update an existing resource	PUT	UPDATE
Update part of an existing resource	PATCH	UPDATE
Delete an existing resource	DELETE	DELETE
Returns same HTTP headers as GET, but no body content	HEAD	
Return the supported HTTP methods for the given URL	OPTIONS	
Echo back the request	TRACE	

Table 17.1: HTTP Methods

A few notes on the above:

- If you're implementing a read-only API, you might only need to implement GET methods.
- If you're implementing a read-write API, you should use the GET, POST, PUT, and DELETE methods.
- Relying on just GET and POST for all actions can be a frustrating pattern for API users.
- By definition, GET, PUT, and DELETE are idempotent. POST and PATCH are not.
- PATCH is often not implemented, but it's a good idea to implement it if your API supports PUT requests.
- Django Rest Framework is designed around these methods, understand them and DRF itself becomes easier to understand.

Here are some common HTTP status codes that should be considered when implementing a REST API. DRF's generic views and viewsets return these values as appropriate for the method called. Note that this is a partial list; a much longer list of status codes can be found at en.wikipedia.org/wiki/List_of_HTTP_status_codes.

17.2 Illustrating Design Concepts With a Simple API

In order to illustrate how DRF ties together HTTP methods, HTTP status codes, serialization, and views, let's create a simple JSON API. We'll use the *flavors* app example from previous chapters as our base, providing the capability to create, read, update, and delete flavors via HTTP requests using AJAX, python-requests, or some other library.

We'll begin by checking that we have a tightly secured API. In our settings file we set our default permission classes to allow just admins:

Example 17.1: Our Standard Default DRF Permission Classes

```
REST_FRAMEWORK = {
    'DEFAULT_PERMISSION_CLASSES': (
        'rest_framework.permissions.IsAdminUser',
    ),
}
```

TIP: IsAdminUser as the Constant Default Permission Class

We like to lock down our projects, especially our REST APIs. There's no better way to this then to have `rest_framework.permissions.IsAdminUser` as the

HTTP Status Code 200 OK	Success/Failure Success	Meaning GET - Return resource PUT - Provide status message or return resource
201 Created	Success	POST - Provide status message or return newly created resource
204 No Content	Success	PUT or DELETE - Response to successful update or delete request
304 Not Modified	Redirect	ALL - Indicates no changes since the last request. Used for checking Last-Modified and ETag headers to improve performance.
400 Bad Request	Failure	ALL - Return error messages, including form validation errors.
401 Unauthorized	Failure	ALL - Authentication required but user did not provide credentials or provided invalid ones.
403 Forbidden	Failure	ALL - User attempted to access restricted content
404 Not Found	Failure	ALL - Resource is not found
405 Method Not Allowed	Failure	ALL - An unallowed HTTP method was attempted.
410 Gone	Failure	ALL - A requested resource is no longer available and won't be available in the future. Used when an API is shut down in favor of a newer version of an API. Mobile applications can test for this condition, and if it occurs, tell the user to upgrade.
429 Too Many Requests	Failure	ALL - The user has sent too many requests in a given amount of time. Intended for use with rate limiting.

Table 17.2: HTTP Status Codes

default permission class. This we can override on a per-view basis. This makes our API views very secure by default, something worth more than having to add a few extra lines of code in our API views.

With that out of the way, here's our `Flavor` model again, but enhanced with a UUID for API lookups:

Example 17.2: Flavor Model Used in Our REST API

```
# flavors/models.py
import uuid as uuid_lib

from django.db import models
from django.urls import reverse

class Flavor(models.Model):
    title = models.CharField(max_length=255)
    slug = models.SlugField(unique=True)  # Used to find the web
    → URL
    uuid = models.UUIDField( # Used by the API to look up the
    → record
        db_index=True,
        default=uuid_lib.uuid4,
        editable=False)
    scoops_remaining = models.IntegerField(default=0)

    def get_absolute_url(self):
        return reverse('flavors:detail', kwargs={'slug':
        → self.slug})
```

WARNING: Don't Use Sequential Keys as Public Identifiers

Sequential keys, such as what Django provides as a default as model primary keys, can be a security concern if used publicly. We cover this in-depth at [Section 28.28: Never Display Sequential Primary Keys](#).

In our example, we're going to use the model's UUID rather than the model's primary key to look up our records. We always try to avoid using sequential numbers for lookups.

Define the serializer class:

Example 17.3: Flavor model serializer

```
# flavors/api/serializers.py
from rest_framework import serializers

from ..models import Flavor

class FlavorSerializer(serializers.ModelSerializer):
    class Meta:
        model = Flavor
        fields = ['title', 'slug', 'uuid', 'scoops_remaining']
```

Now let's add in our API views:

Example 17.4: Flavor API views

```
# flavors/api/views.py
from rest_framework.generics import (
    ListCreateAPIView,
    RetrieveUpdateDestroyAPIView
)
from rest_framework.permissions import IsAuthenticated

from ..models import Flavor
from .serializers import FlavorSerializer

class FlavorListCreateAPIView(ListCreateAPIView):
    queryset = Flavor.objects.all()
    permission_classes = (IsAuthenticated, )
    serializer_class = FlavorSerializer
    lookup_field = 'uuid' # Don't use Flavor.id!

class
→ FlavorRetrieveUpdateDestroyAPIView(RetrieveUpdateDestroyAPIView):
    queryset = Flavor.objects.all()
    permission_classes = (IsAuthenticated, )
    serializer_class = FlavorSerializer
    lookup_field = 'uuid' # Don't use Flavor.id!
```

We're done! Wow, that was fast!

TIP: Classy Django REST Framework Is a Useful Reference

For working with the Django Rest Framework, we've found that <http://cdrf.co> is a great cheat sheet. It is patterned after the famous ccbv.co.uk reference site, but tailored for Django REST Framework.

Now we'll wire this into our *flavors/urls.py* module:

Example 17.5: Wiring in API Views

```
# flavors/urls.py
from django.urls import path

from flavors.api import views

urlpatterns = [
    # /flavors/api/
    path(
        route='api/',
        view=views.FlavorListCreateAPIView.as_view(),
        name='flavor_rest_api'
    ),
    # /flavors/api/:uuid/
    path(
        route='api/<uuid:uuid>',
        view=views.FlavorRetrieveUpdateDestroyAPIView.as_view(),
        name='flavor_rest_api'
    )
]
```

What we are doing is reusing the URLConf name, making it easier to manage when you have a need for a JavaScript-heavy front-end. All you need to do is access the Flavor resource via the `{% url %}` template tag.

In case it's not clear exactly what our URLConf is doing, let's review it with a table:

Url	View	Url Name (same)
/flavors/api/	FlavorListCreateAPIView	flavor_rest_api
/flavors/api/:uuid/	FlavorRetrieveUpdateDestroyAPIView	flavor_rest_api

Table 17.3: URLConf for the Flavor REST APIs

WARNING: Our Simple API Does Not Use Permissions

We overrode the default `IsAdmin` permission with `IsAuthenticated`. If you implement an API using our example, don't forget to assign user permissions appropriately!

- django-rest-framework.org/api-guide/authentication
- django-rest-framework.org/api-guide/permissions

The end result is the traditional REST-style API definition:

Example 17.6: Traditional REST-style API definition

```
flavors/api/  
flavors/api/:uuid/
```

TIP: Common Syntax for Describing REST APIs

It's not uncommon to see syntax like what is described in the [Wiring in API Views](#) code example. In this particular case, `/flavors/api/:uuid/` includes a `:uuid` value. This represents a variable, but in a manner suited for documentation across frameworks and languages, and you'll see it used in many third-party REST API descriptions.

We've shown you (if you didn't know already) how it's very easy to build REST APIs in Django. Now let's go over some advice on maintaining and extending them.

17.3 REST API Architecture

Building simple, quick APIs is easy with Django REST Framework, but extending and maintaining it to match your project's needs takes a bit more thought. This is usually where people get hung up on API design. Here are some tips for improving your design:

17.3.1 Use Consistent API Module Naming

Just like anything else, how things are named needs to be consistent across a project. Our preferences for naming module related to API design is as follows:

Example 17.7: Our Preferences for Naming API-Related Modules

```
flavors/  
|   api/
```

```

    ├── __init__.py
    ├── authentication.py
    ├── parsers.py
    ├── permissions.py
    ├── renderers.py
    ├── serializers.py
    ├── validators.py
    ├── views.py
    └── viewsets.py

```

Please observe the following:

- We like to place all our API components into a package within an app called *api/*. That allows us to isolate our API components in a consistent location. If we were to put it in the root of our app, then we would end up with a huge list of API-specific modules in the general area of the app.
- Viewsets belong in their own module.
- We always place routers in *urls.py*. Either at the app or project level, routers belong in *urls.py*.

17.3.2 Code for a Project Should Be Neatly Organized

For projects with a lot of small, interconnecting apps, it can be hard to hunt down where a particular API view lives. In contrast to placing all API code within each relevant app, sometimes it makes more sense to build an app specifically for the API. This is where all the serializers, renderers, and views are placed.

Therefore, the name of the app should reflect its API version (see [Section 17.3.7: Version Your API](#)).

For example, we might place all our views, serializers, and other API components in an app titled *api v4*.

The downside is the possibility for the API app to become too large and disconnected from the apps that power it. Hence we consider an alternative in the next subsection.

17.3.3 Code for an App Should Remain in the App

When it comes down to it, REST APIs are just views. For simpler, smaller projects, REST API views should go into *views.py* or *viewsets.py* modules and follow the same guidelines we

endorse when it comes to any other view. The same goes for app- or model-specific serializers and renderers. If we do have app-specific serializers or renderers, the same applies.

For apps with so many REST API view classes that it makes it hard to navigate a single `api/views.py` or `api/viewsets.py` module, we can break them up. Specifically, we move our view (or viewset) classes into a `api/views/` (or `api/viewsets/`) package containing Python modules typically named after our models. So you might see:

```
flavors/
  └── api/
      ├── __init__.py
      ├── ... other modules here
      └── views
          ├── __init__.py
          ├── flavor.py
          └── ingredient.py
```

The downside with this approach is that if there are too many small, interconnecting apps, it can be hard to keep track of the myriad of places API components are placed. Hence we considered another approach in the previous subsection.

17.3.4 Try to Keep Business Logic Out of API Views

Regardless of which architectural approach you take, it's a good idea to try to keep as much logic as possible out of API views. If this sounds familiar, it should. We covered this in [Section 8.5: Try to Keep Business Logic Out of Views](#). Remember, at the end of the day, API views are just another type of view.

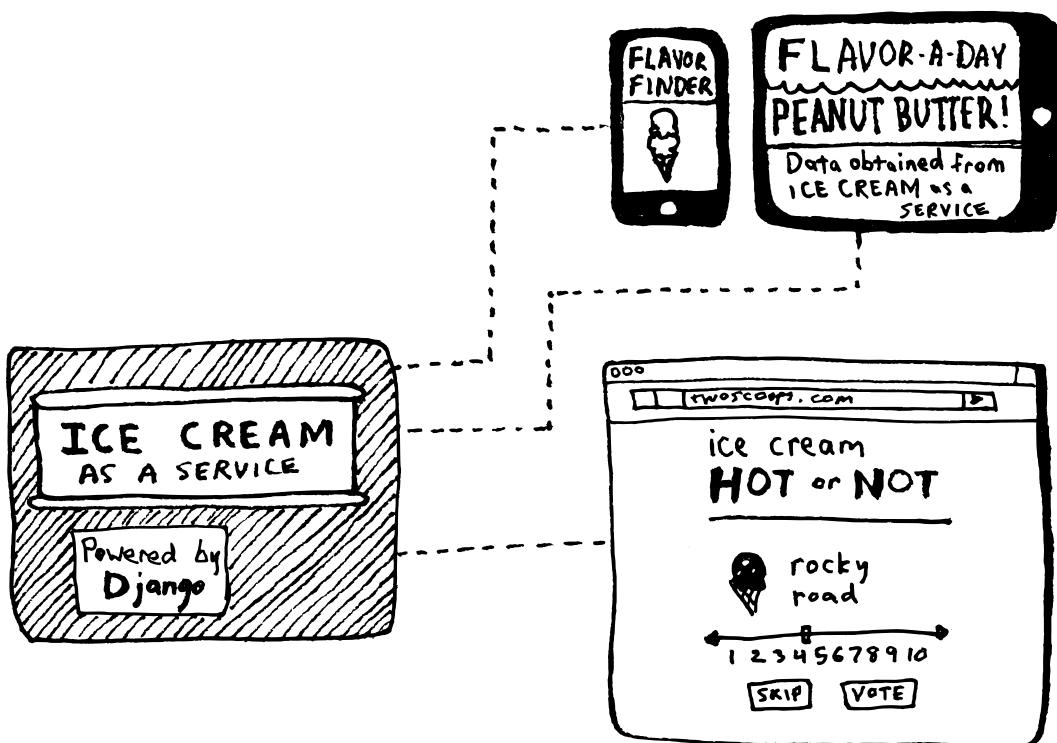


Figure 17.1: An Ice Cream as a Service API.

17.3.5 Grouping API URLs

If you have REST API views in multiple Django apps, how do you build a project-wide API that looks like this?

Example 17.9: Project-Wide API Design

```
api/flavors/ # GET, POST
api/flavors/:uuid/ # GET, PUT, DELETE
api/users/ # GET, POST
api/users/:uuid/ # GET, PUT, DELETE
```

In the past, we placed all API view code into a dedicated Django app called *api* or *apiv1*, with custom logic in some of the REST views, serializers, and more. In theory it's a pretty good approach, but in practice it means we have logic for a particular app in more than just one location.

Our current approach is to lean on URL configuration. When building a project-wide API we write the REST views in the *api/views.py* or *api/viewsets.py* modules, wire them into

a URLConf called something like `core/api_urls.py` or `core/apiv1_urls.py`, and include that from the project root's `urls.py` module. This means that we might have something like the following code:

Example 17.10: Combining Multiple App API Views Into One

```
# core/api_urls.py
"""
Called from the project root's urls.py URLConf thus:
    path('api/', include('core.api_urls', namespace='api')),
"""

from django.urls import path

from flavors.api import views as flavor_views
from users.api import views as user_views

urlpatterns = [
    # {% url 'api:flavors' %}
    path(
        route='flavors/',
        view=flavor_views.FlavorCreateReadView.as_view(),
        name='flavors'
    ),
    # {% url 'api:flavors' flavor.uuid %}
    path(
        route='flavors/<uuid:uuid>',
        view=flavor_views.FlavorReadUpdateDeleteView.as_view(),
        name='flavors'
    ),
    # {% url 'api:users' %}
    path(
        route='users/',
        view=user_views.UserCreateReadView.as_view(),
        name='users'
    ),
    # {% url 'api:users' user.uuid %}
    path(
        route='users/<uuid:uuid>',
        view=user_views.UserReadUpdateDeleteView.as_view(),
        name='users'
    ),
]
```

17.3.6 Test Your API

We find that Django's test suite makes it really easy to test API implementations. It's certainly much easier than staring at `curl` results! Testing is covered at length in [Chapter 24: Testing Stinks and Is a Waste of Money!](#). We even include in that chapter the tests we wrote for our simple JSON API (see [Section 24.3.1: Each Test Method Tests One Thing](#)).

17.3.7 Version Your API

It's a good practice to abbreviate the urls of your API with the version number e.g. `/api/v1/flavors` or `/api/v1/users` and then as the API changes, `/api/v2/flavors` or `/api/v2/users`. We prefer this method or the host name style of versioning `v1.icecreamlania.com/api/users`. When the version number changes, existing customers can continue to use the previous version without unknowingly breaking their calls to the API.

Also, in order to avoid angering API consumers, it's critical to maintain both the existing API and the predecessor API during and after upgrades. It's not uncommon for the deprecated API to remain in use for several months.

When we implement a new version of the API, we provide customers/users with a deprecation warning well in advance of breaking API changes so they can perform necessary upgrades and not break their own applications. From personal experience, the ability to send a deprecation warning to end users is an excellent reason to request email addresses from users of even free and open source API services.

Django REST Framework has built-in mechanisms for supporting the preferred scheme we list above as well as other approaches. Documentation for this exists at django-rest-framework.org/api-guide/versioning/

17.3.8 Be Careful With Customized Authentication Schemes

If you're building an API and need a customized authentication scheme, be extra careful. Security is hard, and there are always unpredictable edge cases, which is how people penetrate sites. We've only had to implement customized authentication schemes a few times, but we kept the following in mind:

- ▶ If we're creating a new authentication scheme, we keep it simple and well tested.
- ▶ Outside of the code, we document why existing standard authentication schemes are insufficient. See the tipbox below.
- ▶ Also outside of the code, we document in depth how our authentication scheme is designed to work. See the tipbox below.

- Unless we are writing a non-cookie based scheme, we don't disable CSRF.

TIP: Documentation Is Critical for Customized Authentication

Writing out the why and how of a customized authentication scheme is a critical part of the process. Don't skip it! Here's why:

- Helps us validate our reasoning for coming up with something new. If we can't describe the problem in writing, then we don't fully understand it.
- Documentation forces us to architect the solution before we code it.
- After the system is in place, later the documentation allows us (or others) to understand why we made particular design decisions.

17.4 When DRF Gets in the Way

Django Rest Framework is a powerful tool that comes with a lot of abstractions. Trying to work through these abstractions can prove to be extremely frustrating. Let's take a look on overcoming them.

17.4.1 Remote Procedure Calls vs REST APIs

The resource model used by REST frameworks to expose data is very powerful, but it doesn't cover every case. Specifically, resources don't always match the reality of application design. For example, it is easy to represent syrup and a sundae as two resources, but what about the action of pouring syrup? Using this analogy, we change the state of the sundae and decrease the syrup inventory by one. While we could have the API user change things individually, that can generate issues with database integrity. Therefore *in some cases it can be a good idea to present a method like sundae.pour_syrup(syrup)* to the client as part of the RESTful API.

In computer science terms, `sundae.pour_syrup(syrup)` could be classified as a **Remote Procedure Call** or **RPC**.

References:

- en.wikipedia.org/wiki/Remote_Procedure_Call
- en.wikipedia.org/wiki/Resource-oriented_architecture

Fortunately, RPC calls are easy to implement with Django Rest Framework. All we have to do is ignore the abstraction tools of DRF and rely instead on its base APIView:

Example 17.11: Implementing pour_syrup() RPC with DRF

```
# sundae/api/views.py
from django.shortcuts import get_object_or_404

from rest_framework.response import Response
from rest_framework.views import APIView

from ..models import Sundae, Syrup
from .serializers import SundaeSerializer, SyrupSerializer

class PourSyrupOnSundaeView(APIView):
    """View dedicated to adding syrup to sundaes"""

    def post(self, request, *args, **kwargs):
        # Process pouring of syrup here,
        # Limit each type of syrup to just one pour
        # Max pours is 3 per sundae
        sundae = get_object_or_404(Sundae,
                                   uuid=request.data['uuid'])
        try:
            sundae.add_syrup(request.data['syrup'])
        except Sundae.TooManySyrups:
            msg = "Sundae already maxed out for syrups"
            return Response({'message': msg}, status_code=400)
        except Syrup.DoesNotExist:
            msg = "{} does not exist".format(request.data['syrup'])
            return Response({'message': msg}, status_code=404)
        return Response(SundaeSerializer(sundae).data)

    def get(self, request, *args, **kwargs):
        # Get list of syrups already poured onto the sundae
        sundae = get_object_or_404(Sundae,
                                   uuid=request.data['uuid'])
        syrups = [SyrupSerializer(x).data for x in
                  sundae.syrup_set.all()]
        return Response(syrups)
```

And our API design would look like this now:

Example 17.12: Sundae and Syrup API Design

```
/sundae/  # GET, POST  
/sundae/:uuid/  # PUT, DELETE  
/sundae/:uuid/syrup/  # GET, POST  
/syrup/  # GET, POST  
/syrup/:uuid/  # PUT, DELETE
```

17.4.2 Problems With Complex Data

Okay, we'll admit it, we make this mistake with DRF about once a month. Let's sum up what happens in very simple terms with the following API design:

Example 17.13: A Cone and Scoop API

```
/api/cones/  # GET, POST  
/api/cones/:uuid/  # PUT, DELETE  
/api/scoops/  # GET, POST  
/api/scoops/:uuid/  # PUT, DELETE
```

- ❶ We have a model (Scoop) that we want represented within another (Cone)
- ❷ We can easily write a GET of the Cone that includes a list of its Scoops
- ❸ On the other hand, writing a POST or PUT of Cones that also adds or updates its Scoops at the same time can be challenging, especially if it requires any kind of validation or post processing
- ❹ Frustration sets in and we leave to get some real-world ice cream

While there are nicely complex solutions for nested data, we've found a better solution. And that is to simplify things just a bit. Example:

- Keep the GET representation of the Cone that includes its Scoops
- Remove any capability of the POST or PUT for the Cone model to modify Scoops for that cone.
- Create GET/POST/PUT API views for Scoops that belong to a Cone.

Our end API will now look like this:

Example 17.14: A Cone and Scoop API

```
/api/cones/ # GET, POST
/api/cones/:uuid/ # PUT, DELETE
/api/cones/:uuid/scoops/ # GET, POST
/api/cones/:uuid/scoops/:uuid/ # PUT, DELETE
/api/scoops/ # GET, POST
/api/scoops/:uuid/ # PUT, DELETE
```

Yes, this approach does add extra views and additional API calls. On the other hand, this kind of data modeling can result in simplification of your API. That simplification will result in easier testing, hence a more robust API.

For what it's worth, if you take a close look at the Stripe API reference (stripe.com/docs/api) you'll see they follow our pattern. You can view complex data, but you have to create it bit-by-bit.

17.4.3 Simplify! Go Atomic!

In the previous two subsections (RPC Calls and Problems With Complex Data), we've established a pattern of simplification. In essence, when we run into problems with DRF we ask these questions:

- Can we simplify our views? Does switching to `APIView` resolve the problem?
- Can we simplify our REST data model as described by views? Does adding more views (of a straightforward nature) resolve the problem?
- If a serializer is troublesome and is outrageously complex, why not break it up into two different serializers for the same model?

As you can see, to overcome problems with DRF, we break our API down into smaller, more atomic components. We've found that it's better to have more views designed to be as atomic as possible than a few views with many options. As any experienced programmer knows, more options means more edge cases.

Atomic-style components help in these regards:

- Documentation is easier/faster because each component does less
- Easier testing since there are less code branches
- Bottlenecks are easier to resolve because chokepoints are more isolated
- Security is better since we can easily change access per view rather than within the code of a view

17.5 Shutting Down an External API

When it's time to shut down an older version of an external API in favor of a new one, here are useful steps to follow:

17.5.1 Step #1: Notify Users of Pending Shut Down

Provide as much advance notice as possible. Preferably six months, but as short as one month. Inform API users via email, blogs, and social media. We like to report the shutdown notification to the point that we worry people are getting tired of the message.

17.5.2 Step #2: Replace API With 410 Error View

When the API is finally shut down, we provide a simple 410 Error View. We include a very simple message that includes the following information:

- A link to the new API's endpoint.
- A link to the new API's documentation.
- A link to an article describing the details of the shut down.

Below is a sample shutdown view that works against any HTTP method:

Example 17.15: Code for a Shutdown

```
# core/apiv1_shutdown.py
from django.http import HttpResponseRedirect

apiv1_gone_msg = """APIv1 was removed on April 2, 2017. Please
→ switch to APIv2:
<ul>
    <li>
        <a href="https://www.example.com/api/v3/">APIv3
    → Endpoint</a>
    </li>
    <li>
        <a href="https://example.com/apiv3_docs/">APIv3
    → Documentation</a>
    </li>
    <li>
        <a href="http://example.com/apiv1_shutdown/">APIv1 shut
    → down notice</a>
    </li>
</ul>
```

```
"""
def apiv1_gone(request):
    return HttpResponseGone(apiv1_gone_msg)
```

17.6 Rate-Limiting Your API

Rate limiting is when an API restricts how many requests can be made by a user of the API within a period of time. This is done for a number of reasons, which we'll explain below.

17.6.1 Unfettered API Access Is Dangerous

In the ancient times (2010) we launched the djangopackages.org website. The project, started during the Django Dash contest, was an instant hit for the Django community. We sprinted on it constantly, and its feature set grew rapidly. Unfortunately, we quickly hit the rate limit of GitHub's first API. This meant that after a certain amount of API requests per hour, we weren't allowed to make any more until a new hour passed.

Fortunately at DjangoCon 2010 we had the opportunity to ask one of the founders of GitHub if we could have unlimited access to their API. He graciously said 'yes' and within a day we could get data from GitHub as much as we wanted.

We were delighted. Our users were delighted. Usage of the site increased, people were thirsty for data as to what were the most active projects. So desirous of data were we that every hour we requested the latest data from GitHub. And that caused a problem for GitHub.

You see, this was 2010 and GitHub was not the giant, powerful company it is today. At 17 minutes past each hour, Django Packages would send thousands of requests to the GitHub API in a very short period. With unfettered access we were causing them problems.

Eventually, GitHub contacted us and requested that we scale back how much we were using their API. We would still have unlimited access, just needed to give them breathing room. We complied, checking data once per day instead of by the hour, and at a more reasonable rate. We continue to do so to this day.

While modern GitHub can certainly handle much, much larger volumes of API access than it could in late 2010, we like to think we learned a shared lesson about unfettered access to an API: Grant such access cautiously.

17.6.2 REST Frameworks Must Come With Rate Limiting

Controlling the volume of REST API access can mean the difference between joyful triumph or utter disaster in a project.

TIP: HTTP Server Rate Limiting

It's possible to use nginx or apache httpd for rate limiting. The upside is faster performance. The downside is that it removes this functionality from the Python code. For a python-based system, DRF provides some basic tools that can be built upon.

- nginx.com/blog/rate-limiting-nginx/
- httpd.apache.org/docs/2.4/mod/mod_ratelimit.html
- django-rest-framework.org/api-guide/throttling/#setting-the-throttling-policy

17.6.3 Rate Limiting Can Be a Business Plan

Imagine we launch an API-based startup that lets users add images of toppings to images of ice cream. We know that everyone will want to use this API, and come up with several tiers of access that we tie into pricing:

Developer tier is free, but only allows 10 API requests per hour.

One Scoop is \$24/month, allows 25 requests per minute.

Two Scoops is \$79/month, allows 50 requests per minute.

Corporate is \$5000/month, allows for 200 requests per minute.

This method is called **Bucket-Based Pricing**. Now all we have to do is get people to use our API.

TIP: Consider Usage-Based Pricing Instead of Rate Limit-Based Pricing

Randall Degges makes a strong argument that the business plan of bucket based pricing we suggest in this section is not a good business plan. He advocates unlimited usage from the beginning, where API users are charged in volume, with the price per unit going down as usage increases. His version of our chart might then be:

- First 1000 requests made per month are free
- 1001 to 100,000 requests made per month cost 0.4 cents each
- 100,001 to 200,000 requests made per month cost 0.3 cents each
- 200,001+ requests made per month cost 0.2 cents each

The advantage of Usage-Based Pricing is that it incentivizes volume over trying to

fit into buckets or tiers. The downside is it will require more work to set up this billing plan in your project. Third-party services like Stripe and Paddle can add fees or additional amounts to subscriptions, so it's possible to do in common payment systems.

Reference: rdegges.com/2020/the-only-type-of-api-services-ill-use

17.7 Advertising Your REST API

Let's assume we've built our REST API and want outside coders and companies to use it. How do we go about doing that?

17.7.1 Documentation

The most important thing to do is to provide comprehensive documentation. The easier to read and understand the better. Providing easy-to-use code examples is a must. You can write it from scratch or use auto-documentation tools provided by django-rest-framework itself and various third-party packages (django-rest-framework.org/topics/documenting-your-api/#third-party-packages). You can even embrace commercial documentation generation services like readthedocs.com and swagger.io.

Some of the material in [Chapter 25: Documentation: Be Obsessed](#) might prove useful for forward-facing REST API documentation.

17.7.2 Provide Client SDKs

Something that may help spread use of your API is to provide a **software development kits (SDK)** for various programming languages. The more programming languages covered the better. For us, we've found the must-have languages include Python, JavaScript, Ruby, PHP, Go, and Java.

In our experience, it's a good idea to write at least one of these libraries ourselves and create a demo project. The reason is that it not only advertises our API, it forces us to experience our API from the same vantage point as our consumers.

Fortunately for us, thanks to the underlying **OpenAPI** document object model of (openapis.org/), DRF provides **JSON Hyperschema**-compatible functionality. When this format is followed for both the client- and server-side, OpenAPI allows for writing dynamically driven client libraries that can interact with any API that exposes a supported schema or hypermedia format.

These tools should work immediately with most DRF-powered APIs:

- Command line client

<https://www.django-rest-framework.org/api-guide/schemas/#generating-an-openapi-schema>

- Multi-language Client SDK generator

github.com/OpenAPITools/openapi-generator

- swagger-cli for use with JavaScript

npmjs.com/package/swagger-cli

For building Python-powered client SDKs, reading [Section 23.9: Releasing Your Own Django Packages](#) might prove useful.

17.8 Additional Reading

We highly recommend reading the following:

- en.wikipedia.org/wiki/REST
- en.wikipedia.org/wiki/List_of_HTTP_status_codes
- github.com/OAI/OpenAPI-Specification
- jacobian.org/writing/rest-worst-practices/

17.9 Other Approaches for Crafting APIs

For the reasons explained at the beginning of this chapter, *we recommend Django Rest Framework*. However, should you choose not to use DRF, consider the following approaches:

17.9.1 CBV Approach: JsonResponse with View

It is possible to use Django's built-in `django.http.JsonResponse` class, which is a subclass of `django.http.HttpResponse`, on `django.views.generic.View`. This supports the full range of HTTP methods but has no support for OpenAPI. . This is proven to work with `async views`.

Example 17.16: Simple JsonResponse View

```
class FlavorAPIView(LoginRequiredMixin,View):  
    def post(self, request, *args, **kwargs):  
        # logic goes here  
        return JsonResponse({})  
  
    def get(self, request, *args, **kwargs):  
        # logic goes here  
        return JsonResponse({})  
  
    def put(self, request, *args, **kwargs):
```

```

# logic goes here
return JsonResponse({})

def delete(self, request, *args, **kwargs):
    # logic goes here
    return JsonResponse({})

```

17.9.2 FBV approach: django-jsonview

While you can use DRF with function-based views, that approach doesn't have all the features of CBV-based DRF. A simpler approach is to use **django-jsonview**. The downside is that when you get into the full range of HTTP methods and more complex API designs, we've found in Django FBVs become a hindrance due to their lack of focus on building APIs or support for OpenAPI.

17.9.3 django-tastypie

django-tastypie is a mature API framework that implements its own class-based view system. Predating Django REST Framework by 3 years, it's a feature-rich, mature, powerful, stable tool for creating APIs from Django models.

django-tastypie.readthedocs.io/

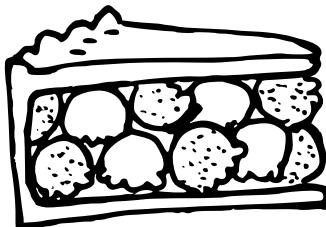


Figure 17.2: A tasty pie is one filled with ice cream.

17.10 Summary

In this chapter we covered:

- ▶ Why you should use Django Rest Framework
- ▶ Basic REST API concepts and how they relate to Django Rest Framework
- ▶ Security considerations
- ▶ Grouping strategies
- ▶ Simplification strategies

- Fundamentals of basic REST API design
- Alternatives to Django REST Framework

Coming up next, we'll go over the other side of REST APIs in [Chapter 19: JavaScript and Django](#).

18 | Building GraphQL APIs With Django

WARNING: This Chapter is in Progress

With the Async Views still not in core, the landscape for Django and GraphQL remains incomplete. We also did not have enough time to finish consolidating our thoughts.

Therefore, in the days to come we will expand on the material here. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

Started in 2012, GraphQL is a newcomer to the world of API formats. Unlike REST, GraphQL comes with schemas, types, and one of our favorite features is a built-in method to handle real-time update (Subscriptions). Clients of an API specify the data they want, and can easily figure out queries because the schemas and types make it very easy to build introspection tools. GraphQL responses are easily serialized to JSON or YAML. For these reasons and more, GraphQL has seen rapid growth in the past few years.

If you want to learn GraphQL, we recommend the resources at graphql.org/learn

Because GraphQL comes with a query language and types named in clear English terms we've found it easier to teach beginners how to use GraphQL than REST.

18.1 Dispelling the Performance Myth

A lot of people, upon first learning about how GraphQL clients define the data they want to receive, raise concerns about performance. The specific issue raised is how can one cache the data raised by a query if each and every access request could be different?

GraphQL Method	REST Method	Action
query GetRecords()	GET /records	Read-only Query
subscription GetRecords()	no equivalent	Open websocket and update on any changes
query GetRecord(id: X)	GET /record/:id	Read-only Query
subscription GetRecord(id: X)	GET /record/:id	Open websocket and update on any changes
mutation CreateRecord()	POST /records/	Create record
mutation UpdateRecord(id: X)	PUT /records/:id	Update record
mutation DeleteRecord(id: X)	DELETE /records/:id	Delete record

There are several things that destroy this myth:

- ① By specifying only the data they need rather than accepting large REST-style responses, clients consume significantly less data. This can have a dramatic impact on both server and database overhead.
- ② Much like with a REST API, common access patterns can still be identified and handled better through caching, indexing, or code optimization.

Do keep in mind we're not saying that GraphQL APIs are immune to bottlenecks, we're just saying that they are at least as manageable as REST APIs, if not more so due to the lower bandwidth.

Our preferred library for building GraphQL APIs with Django is Ariadne. Here's why:

- Fully asynchronous when used with ASGI and Channels, allowed real-time updates from Django projects via GraphQL Subscriptions.
- If you aren't ready for async yet, you can still run under WSGI.
- Schemas comes first, meaning you are forced to spec out your design before starting to code. Since GraphQL schemas carry so much weight, this is a very powerful feature.
- Creating queries and mutations requires following a simple and lightweight API.
- Supports Apollo Federation, a specification for composing multiple GraphQL services into one GraphQL service.

PACKAGE TIP: What About Graphene?

Graphene was the first mainstream Python library to support the GraphQL specification, and it even comes with a Django integration. The ability to use Django forms or serializers in nodes is a definite bonus. However, while we respect the effort put into it, we have found its shortcomings insurmountable for our own projects.

Specifically:

- ▶ Graphene-Django doesn't support GraphQL Subscriptions, meaning to get real-time updates one is forced to either poll the API from the client or use a separate websocket process. Either is an unacceptable burden and one that we hope Django's new Async Views will empower the library maintainers to correct.
- ▶ On other platforms, such as Apollo server, GraphQL APIs require little code to implement. In comparison, to us Graphene feels heavyweight.

Reference: docs.graphene-python.org/projects/django/

18.2 GraphQL API Architecture

Building simple, quick GraphQL APIs is easy with Ariadne, but extending and maintaining it to match your project's needs takes a bit more thought. This is usually where people get hung up on API design. This section illustrates some things to keep in mind.

18.2.1 Don't Use Sequential Keys as Public Identifiers

Sequential keys, such as what Django provides as a default as model primary keys, can be a security concern if used publicly. We cover this in-depth at [Section 28.28: Never Display Sequential Primary Keys](#).

In our example, we're going to use the model's UUID rather than the model's primary key to look up our records. We always try to avoid using sequential numbers for lookups.

18.2.2 Use Consistent API Module Naming

Just like anything else, how things are named needs to be consistent across a project. Here's two patterns we've explored.

The first is a simple GraphQL architecture suitable for most small-to-mid sized applications. Because Ariadne's API is lightweight, we've found it's workable to write all queries and mutations in one *schemas.py* module.

Example 18.1: Simple GraphQL Architecture

```
config/
├── schema.py # imports forms & models from flavors app
├── settings/
└── urls.py
flavors/
```

```
├── __init__.py
├── app.py
├── forms.py
└── models.py
```

Sometimes a single `schemas.py` module gets too big for comfort. In which case breaking it up across apps has worked well. Queries and mutations are moved to individual apps, then imported into the core `schemas.py` module where `make_executable_schema()` can be called on it.

Example 18.2: Complex GraphQL Architecture

```
config/
├── schema.py # imports queries/mutations from flavors app
├── settings/
└── urls.py
flavors/
├── __init__.py
├── app.py
├── api/
│   ├── queries.py # imports models
│   └── mutations.py # imports forms and models
└── forms.py
    └── models.py
```

Please observe the following about both architectures:

- We're still leaning on Django forms and models
- We stick to intuitive, consistent naming patterns.

18.2.3 Try to Keep Business Logic Out of API Views

Regardless if your API is small or large, it's a good idea to keep your logic where it belongs. Validation should be in forms (or DRF serializers if you prefer them) and database handling should be in models.

It's easy with Ariadne to start dumping business logic into function or class definitions. Avoid this anti-pattern, it makes it harder to test, upgrade, or reuse logic when it comes time to release APIv2.

18.2.4 Test Your API

We've found that the best way to test our Ariadne-powered GraphQL is to use Django's built-in `RequestFactory` system. Here is how Ariadne tests its Django integration: github.com/mirumee/ariadne/blob/master/tests/django/test_query_execution.py

18.2.5 Version Your API

In progress

18.2.6 Be Careful With Customized Authentication Schemes

In progress

18.3 Shutting Down an External API

In progress

19 | JavaScript and Django

This chapter is about JavaScript in the context of Django. Here are the most common ways JavaScript is used in tandem with Django:

- ▶ To provide the entire frontend and consume REST/GraphQL APIs served by Django. This is the **Single Page App** approach often executed with React, Vue, and other frameworks.
- ▶ To enhance templates written in either DTL or Jinja2 served by Django.
- ▶ To make the Django admin useful and efficient. This is important to remember when APIs created with Django are serving native apps, even then JavaScript is often still part of projects.

This chapter will address the following topics:

- ▶ [Section 19.1: Popular JavaScript Approaches](#)
- ▶ [Section 19.2: Consuming Django-served APIs with JavaScript](#)
- ▶ [Section 19.3: Real-Time Woes a.k.a. Latency](#)
- ▶ [Section 19.4: Using JavaScript with Templates Served by Django](#)
- ▶ [???: ??](#)

19.1 Popular JavaScript Approaches

With the advent of faster JavaScript engines and a maturation of the associated community, there has been a rise in new JavaScript frameworks that are designed for integration with REST or GraphQL APIs. The three most popular ones in 2020 seem to be:

React.js facebook.github.io/react/

A JavaScript framework and ecosystem created and maintained by Facebook. Designed for creation of HTML, iOS, and Android applications. React is typically used for Single Page Apps, but can be used to enhance existing pages.

Vue.js vuejs.org

Vue is designed to be incrementally adoptable. While its ecosystem isn't as large as

React.js, the simpler data model is considered easier to learn. In the Django world, Vue is frequently used to enhance existing pages or for building of Single Page Apps frontends.

Angular angular.io

Angular is a typescript-only framework open sourced by Google. Within the Django community it is not as popular as React or Vue.

[React is so 2019. HTML + minimum JS is 2020](#)

– David Heinemeier Hansson, Founder of Rails, Basecamp, and Hey

In addition to these comprehensive Single Page Application frameworks the approach of using serverside rendered HTML templates remains popular. While this might seem like a step backwards, new approaches to this older architecture has demonstrated that it remains a viable approach. Sites like hey.com, basecamp.com, and the forthcoming Writernaut project demonstrate SPA-like speed and power using traditional HTML templates.

Vanilla JavaScript developer.mozilla.org/en-US/docs/Web/JavaScript

Vanilla JavaScript is plain JavaScript without any additional libraries like React, Vue, or jQuery. There was a time when such libraries were absolutely necessary, but JavaScript in the browser has become a powerful, feature-rich tool for building projects.

Small, Focused Libraries + Vanilla JavaScript While Vanilla JavaScript's interaction with the DOM has grown in recent years, there are a number of useful libraries that can empower developers and reduce code complexity. Examples include:

- Alpine.js github.com/alpinejs/alpine is a rugged, minimal framework for composing JavaScript behavior in markup. The syntax is intentionally almost identical to Vue, giving the power of Vue without the associated heavyweight architecture.
- Turbolinks github.com/turbolinks/turbolinks Uses HTML to render views on the server side and link to pages as usual. When users follow a link, Turbolinks automatically fetches the page, swaps in its <body>, and merges its <head>, all without incurring the cost of a full page load. Getting it running Django isn't trivial, but can dramatically speed up traditional server side rendered template sites.

jQuery jquery.com

Once the backbone of the JavaScript world, so much of functionality JQuery provides has now been factored into Vanilla JavaScript it is rarely used in new projects. However, legions of existing Django projects use it extensively, and will continue to need to be maintained or upgraded to other tools for years to come.

These five options can really improve what we like to call the ‘immediate user experience’. However, with every good thing there are always things to consider and things to do. Here are a number of anti-patterns that we’ve discovered when it comes to frontend projects consuming APIs for content.

19.1.1 Building Single Page Apps When Multi-Page Apps Suffice

Single-page apps with frameworks like React, Vue, and Angular are fun to build, but does a traditional CMS-site need to be one? Certainly the content pages can include API-powered editing controls, but when building this kind of site, there is something to be said for traditional HTML pages.

For example, our health provider in 2017 had a SPA-style site. It was lovely. The way everything moved together was a marvel. And it was completely useless when we had to do any kind of comparative research.

The worst example of the site was when the search system returned a list of doctors we couldn’t easily compare them. When we clicked on one for more information, their data was in a sliding modal. We couldn’t right-click and open several on independant tabs as doing so just took us to the root search page. We could print or email yourself the information on individual doctors, but PDFs and email are awful comparison tools compared to hopping between tabs.

What the site should have provided is individual domain references (i.e. URLs) for each doctor. Either parsed by the server on the back end or even by JavaScript URL management on the front end. This isn’t hard to do, yet it remained a painfully common issue until we went to another healthcare provider.

19.1.2 Upgrading Legacy Sites

Unless the entire site is being scrapped for a new version, don’t upgrade the whole front-end at once.

When working with legacy projects, it’s often easier to add new features as single-page apps. This allows for the maintainers of the project to deliver improved experiences with new features, while preserving the stability of the existing code base. A good example of this might be adding a calendar application to an existing project. This is easily possible with Vue and to a lesser extent with React.

19.1.3 Not Writing Tests

When we first begin working in a new language or framework, including client-side JavaScript, it's tempting to skip the tests. In a word, don't. Working in the client is getting more complicated and sophisticated every year. Between evolving client-side standards, things are simply not as readable there as on the server side.

We cover Django/Python testing in [Chapter 24: Testing Stinks and Is a Waste of Money!](#). A good reference for JavaScript testing is stackoverflow.com/questions/300855/javascript-unit-test-tools-for-tdd

19.1.4 Not Understanding JavaScript Memory Management

Single-page apps are great, but the complex implementations where users keep them open constantly will hold objects in the browser for a very long time. Eventually, if not managed, this can cause browser slowdowns and crashes. Each JavaScript framework comes with tools or advice on how to handle this potential problem, and it's a good idea to know the recommended approach.

19.1.5 Storing Data in the DOM When It's Not jQuery

After years of using jQuery, some of us have grown used to using DOM elements to store data (especially Daniel). However, when using other JavaScript frameworks this isn't ideal. They have their own mechanisms for handling client data, and by not following them we risk losing out on some of the features promised by these frameworks.

We recommend looking up the data management methods for your chosen JavaScript framework and embracing them as deeply as possible.

19.2 Consuming Django-served APIs with JavaScript

Now that we've covered both creating REST APIs and template best practices, let's combine them. In other words, these are best practices for using Django-powered tools to display content to the end user in the browser using content managed by REST/GraphQL APIs and presented by modern JavaScript frameworks.

19.2.1 Learn How to Debug the Client

Debugging client-side JavaScript is a lot more than simply writing `console.log()` and `console.dir()` statements. There are a number of tools for debugging and finding errors, and some of them are specifically written for particular JavaScript frameworks. Once a tool is chosen, it's an excellent idea to take a day to learn how to write client-side tests.

Reference material:

- ▶ developers.google.com/web/tools/chrome-devtools
- ▶ developer.mozilla.org/en-US/docs/Mozilla/Debugging/Debugging_JavaScript

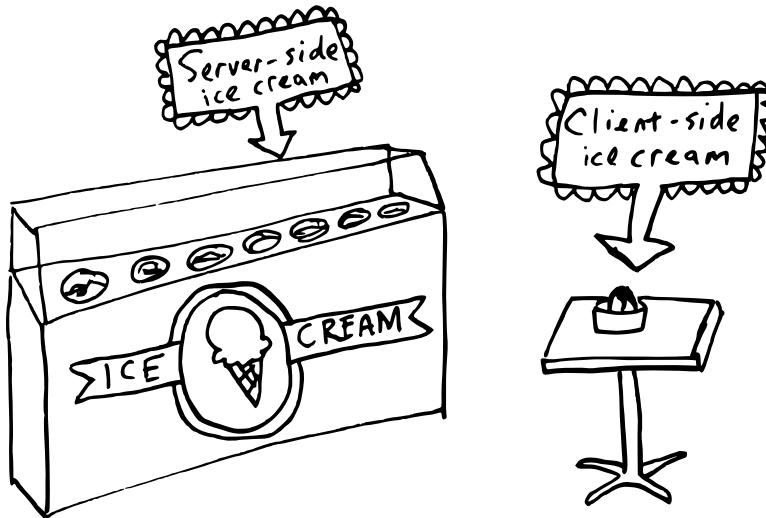


Figure 19.1: Server-side vs. client-side ice cream.

19.2.2 When Possible, Use JavaScript-Powered Static Asset Preprocessors

Up until about 2017, we used Python everywhere, including JavaScript and CSS minification. However, the JavaScript community is maintaining their versions of these tools better than the Python community. That's perfectly okay, because since they've done the work on this part of the toolchain, we can focus on other things.

As we write this, the most commonly used tool for this kind of work is **webpack**. Used by both React, Vue, and every major framework, webpack bundles browser-based scripts to be served as assets. While we prefer to use the stock webpack setup provided by Vue or React CLI tools, understanding webpack is a very powerful skill to have.

References:

- ▶ webpack.js.org
- ▶ github.com/owais/django-webpack-loader - Owais Lone's Django package for transparently using webpack with Django

19.3 Real-Time Woes a.k.a. Latency

Let's say we've put together a well-designed, well-indexed, well-cached real-time project with the widest bandwidth piping content to the world. We can handle any load, and our test users applaud the speed and functionality of the project. Things look great, and we look forward to bonuses and raises.

Then the complaints from the other side of the planet start coming in about the slow speed of the application. Our effort isn't 'real-time' to any of a potentially large block of users and our client/boss is really unhappy.

Congratulations, we've just hit the speed of light!

This isn't a joke, it's a very real problem. Here, Django isn't the problem. Instead, it's physics. The time it takes for HTTP requests to transmit back and forth across half the circumference of the planet is noticeable to human beings. Add in server-side and client-side processing, and we risk alienating potential or existing users.

Also, keep in mind that even the fastest local connections have hiccups and slow-downs. So it's not uncommon for 'real-time' applications to have ways to handle this sort of behavior.

19.3.1 Solution: Mask the Latency With Animations

One of the more common fixes is to have JavaScript-powered animation distract the user from latency issues. We encounter this every time we use a single page app with an attractive interface, including all modern web-based email clients.

19.3.2 Solution: Fake Successful Transactions

Another solution involves processing the request on the client-side as if the request successfully made it to the server. We'll need to include client-side logic to handle failures, but JavaScript frameworks handling HTTP requests are asynchronous, making this feasible, albeit possibly complicated.

If you've ever suddenly discovered that your cloud-based spreadsheet hadn't saved the data entered for the past 30 seconds, you've uncovered this kind of JavaScript powered trickery in action. As this can be very frustrating, some online tools upon detecting a connection failure, disallow further data entry.

19.3.3 Solution: Geographically Based Servers

Geographically-based servers across all seven continents is an option. However, for Django this is not trivial to implement, not at the programming or database level. It requires a

significant volume of skills and expertise that's outside the scope of this book.

If you have the time and budget, this can be an exciting avenue to explore and we encourage it. However, unless you've done this before there is a good chance you are going to underestimate the effort involved.

19.3.4 Solution: Restrict Users Geographically

Sometimes we just don't have a choice. Perhaps our application is too reliant on 'real-time' performance and geolocating servers might be outside the budget. We might make some people unhappy, but that can be mitigated to some degree by saying things like, 'Support in your country is coming soon!'

19.3.5 AJAX and the CSRF Token

Django's CSRF protection appears to be an inconvenience when writing AJAX calls from the browser to the server. If you use AJAX with Django, especially with REST APIs, you may discover that triggering the CSRF token validation blocks your ability to POST, PATCH, or DELETE data to your API. However, it's part of what makes Django secure, don't disable it!

Our answer to overcoming this hurdle to read and understand the AJAX portion of the CSRF documentation of Django, listed in the resources below. It comes with sample JavaScript code that you can put into your projects.

References:

- docs.djangoproject.com/en/3.2/ref/csrf/
- github.com/jazzband/dj-rest-auth This is a proven authentication library for DRF that depending on circumstances can be used without CSRF.
- ???: ??

WARNING: Don't Use AJAX as an Excuse to Turn Off CSRF

Django core developer Aymeric Augustin says, "...CSRF protection is almost always disabled because the developers couldn't quite figure out how to make it work... if it accepts cookie authentication."

Unless using planning to build a machine-to-machine API, don't build a site with disabled CSRF. If it's not possible to figure out how to make it work, ask for help. No one's going to make fun of someone trying to make their site more secure.

19.4 Using JavaScript with Templates Served by Django

19.4.1 JavaScript Can Go In the Header Again

For years it was advantageous to put links to scripts and <script> tags at the bottom of a page body. Modern browsers are much better at parsing how pages load, so this technique is no longer necessary.

19.4.2 Use JSON Encoding for Data Consumed by JavaScript

Rely on JSON encoding rather than finding ways to dump Python structures directly to templates. It's not just easier to integrate into client-side JavaScript, it's safer. To do this, always use the `json_script` filter.

Example 19.1: Properly JSON encoding Data for JavaScript

```
{{ page_data|json_script:"page-data" }}
<script>
var data = JSON.parse(document.getElementById('page').textContent);
injectNameIntoDiv('scoopName', data.scoop.name);
</script>
```

Don't do this, which must we admit to having done for years.

Example 19.2: Improperly JSON encoding Data for JavaScript

```
// Rendering a value from the Django template
// Hoping no one injected anything malignant
injectNameIntoDiv('scoopName', {{ scoop.name }});
```

Reference: docs.djangoproject.com/en/3.2/ref/templates/builtins/#json-script

19.5 Strengthening JavaScript Skills

One of the best things we can do when implementing the consumption of REST APIs on the client side is to ensure our JavaScript skills are up to par. While Python developers sometimes like to grumble about JavaScript, it is a very capable language in its own right. Any responsible web developer will take the time to ramp up their skills so they can reap the benefits of modern JavaScript.

TODO

19.5.1 Learn More JavaScript!

There are plenty of resources available for improving your basic JavaScript skills. We list our favorites at the end of [Appendix C: Additional Resources](#).

19.6 Follow JavaScript Coding Standards

In the case of JavaScript, we advocate the following guides for both front- and back-end work:

- ▶ Felix's Node.js Style Guide
nodeguide.com/style.html
- ▶ idiomatic.js
github.com/rwaldron/idiomatic.js

19.7 Summary

TODO

20 | Tradeoffs of Replacing Core Components

Some people advocate swapping out core parts of Django's stack for other pieces. Should it be done?

Short Answer: Don't do it. Even one of the founders of Instagram (Kevin Systrom) said to Forbes.com that it's completely unnecessary (bit.ly/2pZx0BO).

Long Answer: It's certainly possible, since Django modules are simply just Python modules. Is it worth it? Well, it's worth it only if:

- You are okay with sacrificing some or all of your ability to use third-party Django packages.
- You have no problem giving up the powerful Django admin.
- You have already made a determined effort to build your project with core Django components, but you are running into walls that are major blockers.
- You have already analyzed your own code to find and fix the root causes of your problems. For example, you've done all the work you can to reduce the numbers of queries made in your templates.
- You've explored all other options including caching, denormalization, etc.
- Your project is a real, live production site with tons of users. In other words, you're certain that you're not just optimizing prematurely.
- You've looked at and rejected adopting a Service Oriented Approach (SOA) for those cases Django has problems dealing with.
- You're willing to accept the fact that upgrading Django will be extremely painful or impossible going forward.

That doesn't sound so great anymore, does it?

20.1 The Temptation to Build FrankenDjango

Every few years, a new fad leads waves of developers to replace some particular core Django component. Here's a summary of some of the fads we've seen come and go.

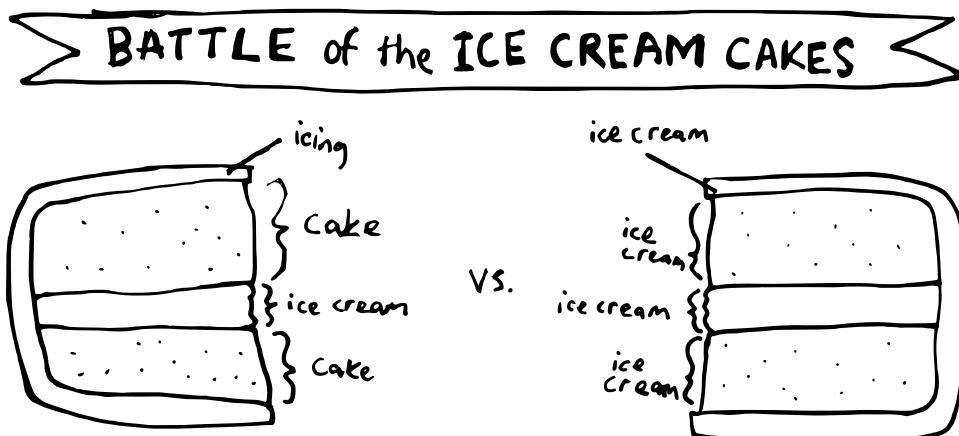


Figure 20.1: Replacing more core components of cake with ice cream seems like a good idea. Which cake would win? The one on the right!

20.2 Non-Relational Databases vs. Relational Databases

Even Django projects that use relational databases for persistent data storage rely on non-relational databases. If a project relies on tools like Memcached for caching and Redis for queuing, then it's using non-relational databases.

The problem occurs when NoSQL solutions are used to completely replace Django's relational database functionality without considering in-depth the long-term implications.

20.2.1 Not All Non-Relational Databases Are ACID Compliant

ACID is an acronym for:

Atomicity means that all parts of a transaction work or it all fails. Without this, you risk data corruption.

Consistency means that any transaction will keep data in a valid state. Strings remain strings and integers remain integers. Without this, you risk data corruption.

Isolation means that concurrent execution of data within a transaction will not collide or leak into another transaction. Without this, you risk data corruption.

Durability means that once a transaction is committed, it will remain so even if the database server is shut down. Without this, you risk data corruption.

Fad	Reasons
For performance reasons, replacing the database/ORM with a NoSQL database and corresponding ORM replacement.	<p>Not okay: “I have an idea for a social network for ice cream haters. I just started building it last month. It must scale to billions!”</p> <p>Okay: “Our site has 50M users and I’m hitting the limits of what I can do with indexes, query optimization, caching, etc. We’re also pushing the limits of our Postgres cluster. I’ve done a lot of research on this and am going to try storing a simple denormalized view of data in Cassandra to see if it helps. I’m aware of the CAP theorem (en.wikipedia.org/wiki/CAP_theorem), and for this view, eventual consistency is fine.”</p>
For data processing reasons, replacing the database/ORM with a NoSQL database and corresponding ORM replacement.	<p>Not okay: “SQL Sucks! We’re going with a document-oriented database like MongoDB!”</p> <p>Okay: “PostgreSQL’s and MySQL’s JSON datatypes replicate nearly every aspect of MongoDB’s data storage system. Yes, MongoDB’s has built-in MapReduce functionality, but it’s easier to execute that in a task queue.”</p>
Replacing Django’s template engine with Jinja2, Mako, or something else.	<p>Not okay: “I read that Jinja2 is faster. I don’t know anything about caching or optimization, but I need Jinja2!”</p> <p>Not okay: “I hate having logic in Python modules. I want logic in my templates!”</p> <p>Okay: “I have a small number of views which generate 1MB+ HTML pages designed for Google to index. I’ll use Django’s native support for multiple template languages to render the 1MB+ sized pages with Jinja2, and serve the rest with Django Template Language.”</p>

Table 20.1: Fad-based Reasons to Replace Components of Django

Did you notice how each of those descriptions ended with ‘*Without this, you risk data corruption.*’? This is because for many NoSQL engines, there is little-to-no mechanism for *ACID* compliance. It’s much easier to corrupt the data, which is mostly a non-issue for things like caching but another thing altogether for projects handling processing of persistent medical or e-commerce data.

20.2.2 Don’t Use Non-Relational Databases for Relational Tasks

Imagine if we were to use a non-relational database to track the sale of properties, property owners, and how property laws worked for them in 50 US states. There are a lot of unpredictable details, so wouldn’t a schemaless datastore be perfect for this task?

Perhaps...

We would need to track the *relationship* between properties, property owners, and laws of 50 states. Our Python code would have to maintain the referential integrity between all the components. We would also need to ensure that the right data goes into the right place.

For a task like this, stick with a relational database.

20.2.3 Ignore the Hype and Do Your Own Research

It’s often said that non-relational databases are faster and scale better than relational databases. Whether or not this is true, don’t blindly swallow the marketing hype of the companies behind any particular alternative database solution.

Instead, do as we do: search for benchmarks, read case studies describing when things went right or wrong, and form opinions as independently as possible.

Also, experiment with unfamiliar NoSQL databases on small hobby side projects before you make major changes to your main project infrastructure. Your main codebase is not a playground.

Lessons learned by companies and individuals:

- Pinterest: medium.com/@Pinterest_Engineering/stop-using-shiny-3e1613c2ce14
- Dan McKinley while at Etsy: mcfunley.com/why-mongodb-never-worked-out-at-etsy
- When to use MongoDB with Django daniel.feldroy.com/when-to-use-mongodb-with-django.html

20.2.4 How We Use Non-Relational Databases With Django

This is how we prefer to do things:

- If we use a *non-relational data store*, limit usage to short-term things like caches, queues, and sometimes denormalized data. But avoid it if possible, to reduce the number of moving parts.
- Use *relational data stores* for long-term, relational data and sometimes denormalized data (PostgreSQL's array and JSON fields work great for this task).

For us, this is the sweet spot that makes our Django projects shine.

20.3 What About Replacing the Django Template Language?

We advocate the practice of sticking entirely to the Django Template Language (DTL) with the exception of rendered content of huge size. However, as this use case is now covered by Django's native support of alternate template systems, we've moved discussion of this topic to [Chapter 16: Django Templates and Jinja2](#).

20.4 Summary

Always use the right tool for the right job. We prefer to go with stock Django components, just like we prefer using a scoop when serving ice cream. However, there are times when other tools make sense.

Just don't follow the fad of mixing vegetables into your ice cream. You simply can't replace the classic strawberry, chocolate, and vanilla with supposedly "high-performance" flavors such as broccoli, corn, and spinach. That's taking it too far.

21 | Working With the Django Admin

When people ask, “*What are the benefits of Django over other web frameworks?*” the admin is what usually comes to mind.

Imagine if every gallon of ice cream came with an admin interface. You’d be able to not just see the list of ingredients, but also add/edit/delete ingredients. If someone was messing around with your ice cream in a way that you didn’t like, you could limit or revoke their access.

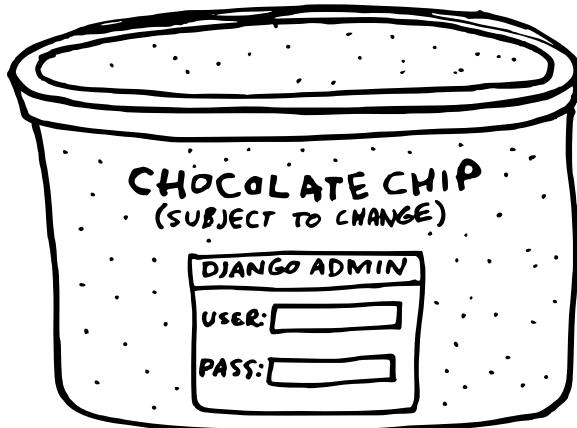


Figure 21.1: Chocolate chip ice cream with an admin interface.

Pretty surreal, isn’t it? Well, that’s what web developers coming from another background feel like when they first use the Django admin interface. It gives you so much power over your web application automatically, with little work required.

21.1 It’s Not for End Users

The Django admin interface is designed for site administrators, not end users. It’s a place for your site administrators to add/edit/delete data and perform site management tasks.

Although it's possible to stretch it into something that your end users could use, you really shouldn't. It's just not designed for use by every site visitor.

21.2 Admin Customization vs. New Views

It's usually not worth it to heavily customize the Django admin. Sometimes, creating a simple view or form from scratch results in the same desired functionality with a lot less work. We've always had better results with creating custom management dashboards for client projects than we have with modifying the admin to fit the need of the client.

21.3 Viewing String Representations of Objects

The default admin page for a Django app shows a list of generic looking objects like this:

The screenshot shows the Django admin interface for an 'Icecreambars' app. The title bar says 'Django administration'. The top navigation bar includes 'WELCOME, AUDREYR', 'VIEW SITE / CHANGE PASSWORD / LOG OUT'. Below that is a breadcrumb trail 'Home > Icecreambars > Ice cream bars'. A green success message box says 'The ice cream bar "IceCreamBar object" was changed successfully.' The main content area has a heading 'Select ice cream bar to change' and a 'ADD ICE CREAM BAR +' button. There is a 'Action:' dropdown set to '-----' and a 'Go' button. A list of four items, each with a checkbox and the text 'IceCreamBar object', is shown. At the bottom, it says '3 ice cream bars'.

Figure 21.2: Admin list page for an ice cream bar app.

That's because the default string representation of an `IceCreamBar` object is "IceCreamBar object". Wouldn't it be helpful to display something better?

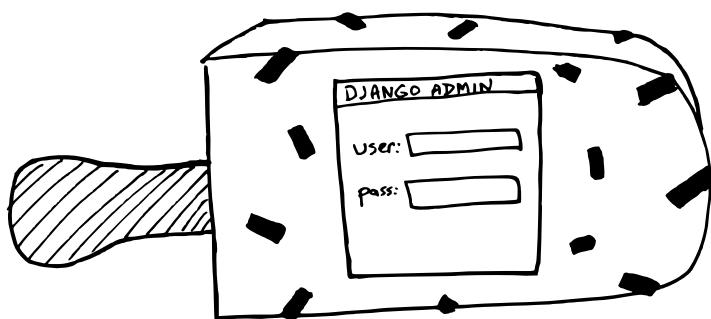


Figure 21.3: What? An admin interface for ice cream bars?

21.3.1 Using `__str__()`

Implementing `__str__()` is straightforward:

Example 21.1: String Representation of Objects

```
from django.db import models

class IceCreamBar(models.Model):
    name = models.CharField(max_length=100)
    shell = models.CharField(max_length=100)
    filling = models.CharField(max_length=100)
    has_stick = models.BooleanField(default=True)

    def __str__(self):
        return self.name
```

The result is as follows:

Django administration

WELCOME, AUDREYR. VIEW SITE / CHANGE PASSWORD / LOG OUT

Home > Icecreambars > Ice cream bars

Select ice cream bar to change

Action: ----- Go 0 of 3 selected

- ICE CREAM BAR
- Vanilla Crisp
- Mint Cookie Crunch
- Strawberry Pie

3 ice cream bars

Figure 21.4: Improved admin list page with better string representation of our objects.

It's more than that. When you're in the shell, you see the better string representation:

Example 21.2: List of Ice Cream Bar Types

```
>>> IceCreamBar.objects.all()
[<IceCreamBar: Vanilla Crisp>, <IceCreamBar: Mint Cookie Crunch>,
 <IceCreamBar: Strawberry Pie>]
```

The `__str__()` method is called whenever you call `str()` on an object. This occurs in the Django shell, templates, and by extension the Django admin. Therefore, try to make the results of `__str__()` nice, readable representation of Django model instances.

21.3.2 Using `list_display`

If you want to change the admin list display in a way that isn't quite a string representation of the object, then use `list_display`.

Example 21.3: Admin List Display

```
from django.contrib import admin

from .models import IceCreamBar

@admin.register(IceCreamBar)
class IceCreamBarModelAdmin(admin.ModelAdmin):
    list_display = ('name', 'shell', 'filling')
```

The result with the specified fields:

The screenshot shows the Django administration interface for the 'Ice cream bars' model. The top navigation bar includes links for 'Home', 'Icecreambars', and 'Ice cream bars'. The main title is 'Select ice cream bar to change'. On the right, there is a button labeled 'ADD ICE CREAM BAR +'. Below the title, there is a search bar and a 'Go' button. A table lists four items: 'Vanilla Crisp' (milk chocolate with crisped rice, vanilla ice cream), 'Mint Cookie Crunch' (dark chocolate with cookie bits, mint chip ice cream), and 'Strawberry Pie' (white chocolate with graham cracker crust, strawberry). The table has columns for 'NAME', 'SHELL', 'FILLING', and checkboxes for selection. At the bottom left, it says '3 ice cream bars'.

NAME	SHELL	FILLING
Vanilla Crisp	milk chocolate with crisped rice	vanilla ice cream
Mint Cookie Crunch	dark chocolate with cookie bits	mint chip ice cream
Strawberry Pie	white chocolate with graham cracker crust	strawberry

Figure 21.5: Further improvements to the admin list page.

21.4 Adding Callables to ModelAdmin Classes

You can use callables such as methods and functions to add functionality to the Django `django.contrib.admin.ModelAdmin` class. This allows you to really modify the list and display screens to suit your ice cream project needs.

For example, it's not uncommon to want to see the exact URL of a model instance in the Django admin. If you define a `get_absolute_url()` method for your model, what Django provides in the admin is a link to a redirect view whose URL is very different from the actual object URL. Also, there are cases where the `get_absolute_url()` method is meaningless (REST APIs come to mind).

In the example below, we demonstrate how to use a simple callable to provide a link to our target URL:

Example 21.4: Adding Callables to ModelAdmin Classes

```
# icecreambars/admin.py
from django.contrib import admin
from django.urls import reverse, NoReverseMatch
from django.utils.html import format_html

from .models import IceCreamBar

@admin.register(IceCreamBar)
class IceCreamBarModelAdmin(admin.ModelAdmin):
    list_display = ('name', 'shell', 'filling')
    readonly_fields = ('show_url',)

    def show_url(self, instance):
        url = reverse('icecreambars:ice_cream_bar_detail',
                      kwargs={'pk': instance.pk})
        response = format_html("""<a href="{0}">{0}</a>""", url)
        return response

    show_url.short_description = 'Ice Cream Bar URL'
```

Since a picture is worth a thousand words, here is what our callable does for us:

The screenshot shows the Django Admin interface for editing an 'Ice cream bar'. The top navigation bar includes links for Home, Icecreambars, Ice cream bars, and What?. On the right, there are links for Welcome, AUDREYR, View Site / Change Password, and Log Out. Below the navigation, the page title is 'Change ice cream bar'. The main content area contains fields for 'Name' (What?), 'Shell' (Cinnamon), and 'Filling' (Minced jalapeño and pesto). A checkbox labeled 'Has stick' is present but unchecked. The URL field shows '/icecreambars/4/'. At the bottom, there are four buttons: 'Delete' (red), 'Save and add another' (blue), 'Save and continue editing' (blue), and 'SAVE' (blue).

Figure 21.6: Displaying URL in the Django Admin.

WARNING: Always Use `format_html` When Presenting Data From Users

Any time data is presented in the admin that includes HTML tags, use `format_html` to ensure that arguments are escaped during the rendering process. This is explained more at [Section 28.9.1: Use `format_html` Over `mark_safe`.](#)

21.5 Be Aware of the Complications of Multiuser Environments

Nothing in the Django admin locks records to a particular staff- or admin-level user. While this is fine for a project with a single person with admin-level access, on a multi-user project it can be a very serious problem. Here is what happens:

- ❶ Via the Django admin, Daniel edits the record for “Peppermint Sundae” ice cream bar. He starts to make changes. He gets a phone call from the marketing officer of Icecreamlandia and leaves his screen open.
- ❷ In the meantime, Audrey decides to modify “Peppermint Sundae” ice cream bar. She spends ten minutes making her changes, then saves the her data.
- ❸ Daniel gets off the phone and finally saves his changes. He overwrites Audrey’s changes.

If you have multiple users with access to the Django admin, you need to be aware of this

possibility.

21.6 Django's Admin Documentation Generator

One of the more interesting developer tools that Django provides is the `django.contrib.admindocs` package. Created in an era before the advent of the documentation tools that we cover in [Chapter 25: Documentation: Be Obsessed](#), it remains a useful tool.

It's useful because it introspects the Django framework to display docstrings for project components like models, views, custom template tags, and custom filters. Even if a project's components don't contain any docstrings, simply seeing a list of harder-to-introspect items like oddly named custom template tags and custom filters can be really useful in exploring the architecture of a complicated, existing application.

Using `django.contrib.admindocs` is easy, but we like to reorder the steps described in the formal documentation:

- ❶ `pip install docutils` into your project's `virtualenv`.
- ❷ Add `django.contrib.admindocs` to your `INSTALLED_APPS`.
- ❸ Add `path('admin/doc/', include('django.contrib.admindocs.urls'))` to your root `URLConf`. Make sure it's included before the `admin/` entry, so that requests to `/admin/doc/` don't get handled by the latter entry.
- ❹ *Optional:* Using the `admindocs` bookmarklets requires the `XViewMiddleware` to be installed.

Once you have this in place, go to `/admin/doc/` and explore. You may notice a lot of your project's code lacks any sort of documentation. This is addressed in the formal documentation on `django.contrib.admindocs`: docs.djangoproject.com/en/3.2/ref/contrib/admin/admindocs/ and our own chapter on [Chapter 25: Documentation: Be Obsessed](#).

21.7 Using Custom Skins With the Django Admin

Over the years there have been a number of efforts to reskin or theme the Django Admin. These range from the venerable, stable, and very popular `django-grappelli` to more recent up-and-comers. They allow easy-to-hard customization.

PACKAGE TIP: Custom `django.contrib.admin` Skins

Here are some of the more popular custom skins:

- **`django-grappelli`** is the grand-daddy of all custom Django skins. Stable, robust, and with a unique but friendly style.

- **django-suit** is built using the familiar Bootstrap front-end framework.
- **jet-admin** is an API-based Admin Panel Framework.

A more complete list can be found at

djangopackages.org/grids/g/admin-styling/.

Django has a gigantic community, so why aren't there more skins?

It turns out that besides the most basic CSS-based modifications, creating custom Django themes is very challenging. For anyone who has delved into the source code for these projects, it's clear that custom admin skins require arcane code to account for some of the idiosyncrasies of `django.contrib.admin`.

Patrick Kranzlmueller, maintainer of `django-grappelli`, goes into great detail in his article on the subject, 'A Frontend Framework for the Django Admin Interface', which you can read at the link below:

- sehmaschine.net/blog/django-admin-frontend-framework.

Here are some tips when working with custom `djangoclassic.contrib.admin` skins:

21.7.1 Evaluation Point: Documentation is Everything

As mentioned earlier, writing a custom skin for `django.contrib.admin` is hard. While the successful skins are relatively easy to add to a project, it's the edge cases (invariably involved in extending the `ModelAdmin` object) that can hurt.

Therefore, when evaluating one of these projects for use on a project, check to see how far the documentation goes beyond installation instructions.

21.7.2 Write Tests for Any Admin Extensions You Create

For our purposes, we've found that while clients enjoy the more modern themes, you have to be careful of how far you extend these admin skins. What works great in vanilla `django.contrib.admin` can break in a custom skin. Since the custom skins have to wrap portions of `django.contrib.admin` abstractions in curious ways, debugging these problems can prove to be a mind-numbing nightmare.

Therefore, if you use a custom skin, the best practice is to write tests of the admin, especially for any customization. Yes, it is a bit of work up front, but it means catching these bugs much, much earlier.

For more on testing, see our writings on testing in [Chapter 24: Testing Stinks and Is a Waste of Money!](#).

21.8 Secure the Django Admin

Since the Django admin gives your site admins special powers that ordinary users don't have, it's good practice to make it extra secure.

21.8.1 Change the Default Admin URL

By default, the admin URL is `yoursite.com/admin/`. Change it to something that's long and difficult to guess.

TIP: Jacob Kaplan-Moss Talks About Changing the Admin URL

Django project co-leader Jacob Kaplan-Moss says (paraphrased) that it's an easy additional layer of security to come up with a different name (or even different domain) for the admin.

It also prevents attackers from easily profiling your site. For example, attackers can tell which version of Django you're using, sometimes down to the point-release level, by examining the HTML content of the login screen for `admin/`.

21.8.2 Use django-admin-honeypot

TODO - Ask Derek to update this package

If you're particularly concerned about people trying to break into your Django site, **django-admin-honeypot** is a package that puts a fake Django admin login screen at `admin/` and logs information about anyone who attempts to log in.

See github.com/dmpayton/django-admin-honeypot for more information.

21.8.3 Only Allow Admin Access via HTTPS

This is already implied in [Section 28.6: HTTPS Everywhere](#), but we want to especially emphasize here that your admin needs to be TLS-secured. If your site allows straight HTTP access, you will need to run the admin on a properly-secured domain, adding to the complexity of your deployment. Not only will you need a second deployment procedure, but you'll need to include logic in your URLConf in order to remove the admin from HTTP access. In the experience of the authors, it's much easier to put the whole site on TLS/HTTPS.

Without TLS, if you log into your Django admin on an open WiFi network, it's trivial for someone to sniff your admin username/password.

21.8.4 Limit Admin Access Based on IP

Configure your web server to only allow access to the Django admin to certain IP addresses. Look up the instructions for your particular web server.

- Nginx instructions tech.marksblogg.com/django-admin-logins.html

An acceptable alternative is to put this logic into middleware. It's better to do it at the web server level because every middleware component adds an extra layer of logic wrapping your views, but in some cases this can be your only option. For example, your platform-as-a-service might not give you fine-grain control over web server configuration.

21.9 Securing the Admin Docs

Since the Django admin docs give your site admins a view into how the project is constructed, it's good practice to keep them extra-secure just like the Django admin. Borrowing from the previous section on the Django admin, we advocate the following:

- Changing the admin docs URL to something besides *yoursite.com/admin/doc/*.
- Only allowing admin docs access via HTTPS.
- Limiting admin docs access based on IP.

21.10 Summary

In this chapter we covered the following:

- Who should be using the Django admin.
- When to use the Django admin and when to roll a new dashboard.
- String representation of objects.
- Adding callables to Django admin classes.
- Using Django's admin docs.
- Encouraging you to secure the Django admin.
- Advised on working with custom Django skins.

22 | Dealing With the User Model

Django comes with a built-in support for user records. It's a useful feature, doubly so once you learn how to extend and expand on the basic functionality. So let's go over the best practices:

22.1 Use Django's Tools for Finding the User Model

The advised way to get to the user class is as follows:

Example 22.1: Using get_user_model to the User Record

```
# Stock user model definition
>>> from django.contrib.auth import get_user_model
>>> get_user_model()
<class django.contrib.auth.models.User>

# When the project has a custom user model definition
>>> from django.contrib.auth import get_user_model
>>> get_user_model()
<class profiles.models.UserProfile>
```

It is possible to get two different `User` model definitions depending on the project configuration. This doesn't mean that a project can have two different `User` models; it means that every project can customize its own `User` model.

22.1.1 Use `settings.AUTH_USER_MODEL` for Foreign Keys to User

In Django, the official preferred way to attach `ForeignKey`, `OneToOneField`, or `ManyToManyField` to `User` is as follows:

Example 22.2: Using `settings.AUTH_USER_MODEL` to Define Model Relations

```
from django.conf import settings
from django.db import models

class IceCreamStore(models.Model):
    owner = models.OneToOneField(settings.AUTH_USER_MODEL)
    title = models.CharField(max_length=255)
```

Yes, it looks a bit strange, but that's what the official Django docs advise.

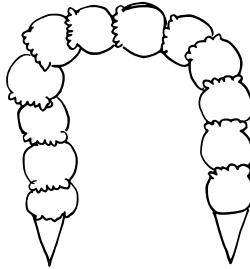


Figure 22.1: This looks strange too.

WARNING: Don't Change `settings.AUTH_USER_MODEL`!

Once set in a project, changing `settings.AUTH_USER_MODEL` requires changing your database schema accordingly. It's one thing to add or modify User model fields, it's another thing to create a whole new User object.

22.1.2 Don't Use `get_user_model()` for Foreign Keys to User

This is bad, as it tends to create import loops.

Example 22.3: Using `get_user_model()` Improperly

```
# DON'T DO THIS!
from django.contrib.auth import get_user_model
from django.db import models

class IceCreamStore(models.Model):
    owner = models.ForeignKey(get_user_model())
    title = models.CharField(max_length=255)
```

```
# This following line tends to create import loops.
owner = models.OneToOneField(get_user_model())
title = models.CharField(max_length=255)
```

22.2 Custom User Fields for Django Projects

In Django, as long as we incorporate the required methods and attributes, we can create our own user model with its own fields.

PACKAGE TIP: Libraries for Defining Custom User Models

django-authtools is a library that makes defining custom user models easier. Of particular use are the `AbstractEmailUser` and `AbstractNamedUser` models. Even if you don't end up using django-authtools, the source code is well worth examining.

At this time django-authtools doesn't support Django 3, even though there is a pull request adding it. Nevertheless, as mentioned before the code is worth a look.

22.2.1 Option 1: Subclass AbstractUser

Choose this option if you like Django's `User` model fields the way they are, but need extra fields. For what it's worth, this is the first approach that we look at anytime we start a new project. When using django-authtools' base models, forms, and admin objects, we find that it's the quickest and easiest way to implement custom user models.

Here's an example of how to subclass `AbstractUser`:

Example 22.4: Subclassing of `AbstractUser`

```
# profiles/models.py
from django.contrib.auth.models import AbstractUser
from django.db import models

class KarmaUser(AbstractUser):
    karma = models.PositiveIntegerField(verbose_name='karma',
                                         default=0,
                                         blank=True)
```

The other thing you have to do is set this in your settings:

Example 22.5: Setting AUTH_USER_MODEL

```
AUTH_USER_MODEL = 'profiles.KarmaUser'
```

22.2.2 Option 2: Subclass AbstractBaseUser

`AbstractBaseUser` is the bare-bones option with only 3 fields: `password`, `last_login`, and `is_active`.

Choose this option if:

- You're unhappy with the fields that the `User` model provides by default, such as `first_name` and `last_name`.
- You prefer to subclass from an extremely bare-bones clean slate but want to take advantage of the `AbstractBaseUser` sane default approach to storing passwords.

If you want to go down this path, we recommend the following reading:

Official Django Documentation Example

docs.djangoproject.com/en/3.2/topics/auth/customizing/#a-full-example

Source code of django-authtools (Especially `admin.py`, `forms.py`, and `models.py`)
github.com/fusionbox/django-authtools

22.2.3 Option 3: Linking Back From a Related Model

This code is very similar to the pre-Django 1.5 project technique of creating ‘Profile’ models. Before discarding this approach as legacy, consider the following use cases:

Use Case: Creating a Third Party Package

- We are creating a third-party package for publication on PyPI.
- The package needs to store additional information per user, perhaps a Stripe ID or another payment gateway identifier.
- We want to be as unobtrusive to the existing project code as possible. Loose coupling!

Use Case: Internal Project Needs

- We are working on our own Django project.
- We want different types of users to have different fields.
- We might have some users with a combination of different user types.

- We want to handle this at the model level, instead of at other levels.
- We want this to be used in conjunction with a custom user model from options #1 or #2.

Either of these use cases provide motive for the continued use of this technique.

To make this technique work, we continue to use `django.contrib.models.User` (called preferably via `django.contrib.auth.get_user_model()`) and keep your related fields in separate models (e.g. `Profiles`). Here's an example:

Example 22.6: Custom User Profile Examples

```
# profiles/models.py

from django.conf import settings
from django.db import models

from flavors.models import Flavor

class EaterProfile(models.Model):

    # Default user profile
    # If you do this you need to either have a post_save signal or
    #     redirect to a profile_edit view on initial login.
    user = models.OneToOneField(settings.AUTH_USER_MODEL)
    favorite_ice_cream = models.ForeignKey(Flavor, null=True,
                                           blank=True)

class ScooperProfile(models.Model):

    user = models.OneToOneField(settings.AUTH_USER_MODEL)
    scoops_scooped = models.IntegerField(default=0)

class InventorProfile(models.Model):

    user = models.OneToOneField(settings.AUTH_USER_MODEL)
    flavors_invented = models.ManyToManyField(Flavor, null=True,
                                              blank=True)
```

Using this approach, we can query for any user's favorite ice cream trivially with the ORM: `user.eaterprofile.favorite_ice_cream`. In addition, Scooper and Inventor

profiles provide individual data that only applies to those users. Since that data is isolated into dedicated models, it's much harder for accidents between user types to occur.

The only downside to this approach is that it's possible to take it too far in complexity of profiles or in the supporting code. As always, keep your code as simple and clean as possible.

WARNING: Third-Party Libraries Should Not Be Defining the User Model

Unless the express purpose of the library is to define custom user models for a project (à la django-authtools), third-party libraries shouldn't be using options #1 or #2 to add fields to user models. Instead, they should rely on option #3.

22.3 Handling Multiple User Types

A common question from Django beginners is how to handle multiple user types. For example with ice cream stores, dealing with customer, employee, and owner user types. Often they think about defining two different user models, which is a dangerous approach to take - Django isn't designed to work that way.

Instead, just use one model and mark it appropriately. There's two primary ways to do this:

22.3.1 Add a User Type Field

This approach assumes different roles have the same data and methods available to them. In the user model, add a choices field distinguishing between types of users. This allows for role checks across a Django project.

Example 22.7: A Choices-Based User Type Field

```
class User(AbstractUser):
    class Types(models.TextChoices):
        EATER = "EATER", "Eater"
        SCOOPER = "SCOOPER", "Scooper"
        INVENTOR = "INVENTOR", "Inventor"

        # What type of user are we?
        type = models.CharField(
            ("Type"), max_length=50, choices=Types.choices,
            → default=Types.EATER
        )
```

Please note that we don't rely on the multiple use of `BooleanField` to control roles. That approach works only in limited circumstances, and becomes confusing as a site grows in size and complexity over time. Better to use a single field to control the role of a User.

Furthermore, the approach we're using relies on a `CharField`. In practice, we tend to use `ForeignKey` relations to a Role model. If users need multiple roles, then we will either make that a `ManyToManyField` or lean on Django's built-in `Group` system. The disadvantage of using Django's built-in `Group` system is the minimal documentation for it.

22.3.2 Add a User Type Field Plus Proxy Models

It is typical for different types of users to have different methods and properties. For example, a SCOPER would have a `scoop_icecream()` method and an EATER would have a `consume()` method.

Let's also make querying for types of user as obvious and explicit as possible. It is easy to forget to include a filter on a type of user, granting them access to things they should not have.

Proxy models makes implementing this easy. First, in our model, add a `base_type` property and extend the built-in `save()` method:

Example 22.8: "The base_type Property"

```
class User(AbstractUser):
    class Types(models.TextChoices):
        EATER = "EATER", "Eater"
        SCOPER = "SCOOPER", "Scooper"
        INVENTOR = "INVENTOR", "Inventor"

        # Ensures that creating new users through proxy models works
        base_type = Types.EATER

        # What type of user are we?
        type = models.CharField(
            _("Type"), max_length=50,
            choices=Types.choices,
            default=Types.EATER
        )

        # ...
```

```
def save(self, *args, **kwargs):
    # If a new user, set the user's type based off the
    # base_type property
    if not self.pk:
        self.type = self.base_type
    return super().save(*args, **kwargs)
```

In our `users/models.py` module, underneath the User mode:

Example 22.9: "Adding the Inventor Proxy Model"

```
class InventorManager(BaseUserManager):
    def get_queryset(self, *args, **kwargs):
        results = super().get_queryset(*args, **kwargs)
        return results.filter(type=User.Types.INVENTOR)

class Inventor(User):
    # This sets the user type to INVENTOR during record creation
    base_type = User.Types.INVENTOR

    # Ensures queries on the Inventor model return only Inventors
    objects = InventorManager()

    # Setting proxy to "True" means a table WILL NOT be created
    #   for this record
    class Meta:
        proxy = True

    # Only inventors get to invent new flavors!
    def invent(self):
        # Magical custom logic goes Here
        return "Delicious!"
```

As mentioned in the comments, proxy models don't add fields. What they do create is references to a model object on which we can hang custom managers, methods, and properties. The example queries below will show the power of this approach:

Example 22.10: Demonstrating the Power of Proxy Models

```
>>> from users.models import User, Inventor
>>> User.objects.count() # Over 300 million users!
323482357
>>> Inventor.objects.count() # But only 3 inventors
3
>>> # Calling someone as both a User and an Inventor
>>> user = User.objects.get(username='uma')
>>> user
<User: uma>
>>> inventor = Inventor.objects.get(username='uma')
>>> inventor
<Inventor: uma>
>>> # Calling a method that's only for inventors
>>> user.invent()
AttributeError
>>> inventor.invent()
'Delicious'
```

The proxy approach gives us multiple types of users without creating a new User table or being forced to dramatically extend `django.contrib.auth` in such a way that we can't use third-party libraries.

That proxy models can have their own model managers means that we can have more explicit queries. This helps prevent mistakes in granting permission. Compare these two code examples for clarity:

Example 22.11: Explicitly Filtering on Inventor Type

```
>>> User.objects.filter(type=User.Types.INVENTOR)
>>> Inventor.objects.filter() # Our preference
```

22.3.3 Adding Extra Data Fields

We've found there two ways to handle extra data fields for different user types:

- ① Use `OneToOneField` relations to profile models as described in [Section 22.2.3: Option 3: Linking Back From a Related Model](#).
- ② Put all the fields in the base User model. This approach is simple, but with enough users and user-specific data can result in the User table slowing. Even without perfor-

mance considerations in, there is significant risk of innappropriate data being held by the wrong user type.

Our preference is the first option, to link back from a related model and combine with proxy models. Here's how we do it using all the "Profile" models from [Section 22.2.3: Option 3: Linking Back From a Related Model](#).

```
class Inventor(User):
    # ...
    objects = InventorManager()

    class Meta:
        proxy = True

    @property
    def extra(self):
        return self.inventorprofile

class Scooper(User):
    # ...
    objects = ScooperManager()

    class Meta:
        proxy = True

    @property
    def extra(self):
        return self.scooperprofile

class Eater(User):
    # ...
    objects = EaterManager()

    class Meta:
        proxy = True

    @property
    def extra(self):
        return self.eaterprofile
```

Now, no matter the user type, the Profile from the One-to-One relationship can be accessed

thus:

- `eater.extra.favorite_ice_cream`
- `scooper.extra.scoops_scooped`
- `invented.extra.flavors_invented`

We really like this approach. It is easy to remember that the relation to the profile table is accessible via the `extra` property. It even works with architectures that allow users to have more than one role.

Proxy models are something typically used sparingly as complex implementations can be confusing. However, under the right circumstances such as multiple user types, they are incredibly useful.

22.3.4 Additional Resources on Multiple User Types

- Daniel Roy Greenfeld's YouTube tutorial on this topic: feld.to/multiple-user-types
- Official documentation on Proxy Models: docs.djangoproject.com/en/3.2/topics/db/models/#proxy-models
- Vitor Freitas' of 'Simple is better than Complex article' on the topic of multiple user types. Very useful article, even if he doesn't use proxy models: feld.to/2vsi3my

22.4 Summary

In this chapter we covered the new method to find the `User` model and define our own custom ones. Depending on the needs of a project, they can either continue with the current way of doing things or customize the actual user model. We also covered the use case of multiple user model types through proxy models.

The next chapter is a dive into the world of third-party packages.

23 | Django's Secret Sauce: Third-Party Packages

TODO - Add mention of <https://www.python.org/dev/peps/pep-0517/>

The real power of Django is more than just the framework and documentation available at djangoproject.com. It's the vast selection of third-party Django and Python packages provided by the open source community. There are many, many third-party packages available for your Django projects which can do an incredible amount of work for you. These packages have been written by people from all walks of life, and they power much of the world today.



Figure 23.1: A jar of Django's mysterious secret sauce. Most don't have a clue what this is.

Much of professional Django and Python development is about the incorporation of third-party packages into Django projects. If you try to write every single tool that you need from scratch, you'll have a hard time getting things done.

This is especially true for us in the consulting world, where client projects consist of many of the same or similar building blocks.

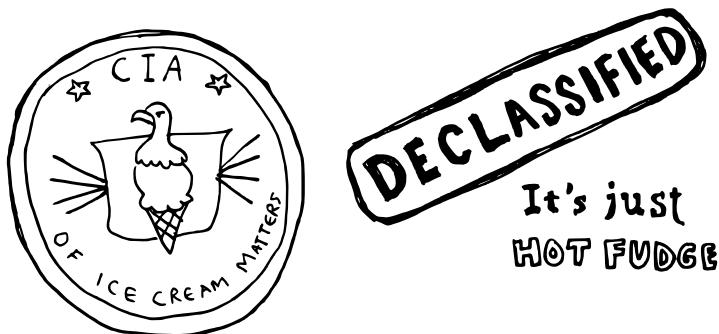


Figure 23.2: The secret is out. It's just hot fudge.

23.1 Examples of Third-Party Packages

Chapter 37: [Appendix A: Packages Mentioned In This Book](#) covers all of the packages mentioned throughout Two Scoops of Django. This list is a great starting point if you're looking for highly-useful packages to consider adding to your projects.

Note that not all of those packages are Django-specific, that means that you can use some of them in other Python projects. (Generally, Django-specific packages have names prefixed with “django-” or “dj-”, but there are many exceptions.)

23.2 Know About the Python Package Index

The **Python Package Index** (PyPI), located at pypi.org/, is a repository of software for the Python programming language. As of the time this sentence was written, it lists over 100,000 packages, including Django itself.

For the vast majority of Python community, no open source project release is considered official until it occurs on the Python Package Index.

The Python Package Index is much more than just a directory. Think of it as the world's largest center for Python package information and files. Whenever you use **pip** to install a particular release of Django, pip downloads the files from the Python Package Index. Most Python and Django packages are downloadable from the Python Package Index in addition to pip.

23.3 Know About [DjangoPackages.org](#)

Django Packages (djangopackages.org) is a directory of reusable apps, sites, tools and more for your Django projects. Unlike PyPI, it doesn't store the packages themselves, instead providing a mix of hard metrics gathered from the Python Package Index, GitHub, ReadTheDocs, and “soft” data entered by users.

Django Packages is best known as a comparison site for evaluating package features. On

Django Packages, packages are organized into handy grids so they can be compared against each other.

Django Packages also happens to have been created by the authors of this book, with contributions from many, many people in the Python community. Thanks to many volunteers it is continually maintained and improved as a helpful resource for Django users.

23.4 Know Your Resources

Django developers unaware of the critical resources of Django Packages and the Python Package Index are denying themselves one of the most important advantages of using Django and Python. If you are not aware of these tools, it's well worth the time you spend educating yourself.

As a Django (and Python) developer, make it your mission to use third-party libraries instead of reinventing the wheel whenever possible. The best libraries have been written, documented, and tested by amazingly competent developers working around the world. Standing on the shoulders of these giants is the difference between amazing success and tragic downfall.

As you use various packages, study and learn from their code. You'll learn patterns and tricks that will make you a better developer.

On the other hand, it's very important to be able to identify the good packages from the bad. It's well worth taking the time to evaluate packages written by others the same way we evaluate our own work. We cover this later in this chapter in [Section 23.10: What Makes a Good Django Package?](#)

23.5 Tools for Installing and Managing Packages

To take full advantage of all the packages available for your projects, having `virtualenv` and `pip` (or Conda or Poetry) installed isn't something you can skip over. It's mandatory.

Refer to [Chapter 2: The Optimal Django Environment Setup](#) for more details.

23.6 Package Requirements

As we mentioned earlier in [Chapter 5: Settings and Requirements Files](#), we manage our Django/Python dependencies with requirements files. These files go into the `requirements/` directory that exists in the root of our projects.

23.7 Wiring Up Django Packages: The Basics

When you find a third-party package that you want to use, follow these steps:

23.7.1 Step 1: Read the Documentation for the Package

Are you sure you want to use it? Make sure you know what you're getting into before you install any package.

23.7.2 Step 2: Add Package and Version Number to Your Requirements

If you recall from [Chapter 5: Settings and Requirements Files](#), a `requirements/base.txt` file looks something like this (but probably longer):

Example 23.1: Adding Packages with Version Numbers to Requirements

```
Django==1.11
coverage==4.3.4
django-extensions==1.7.6
django-braces==1.11
```

Note that each package is pinned to a specific version number. *Always* pin your package dependencies to version numbers.

What happens if you don't pin your dependencies? You are almost guaranteed to run into problems at some point when you try to reinstall or change your Django project. When new versions of packages are released, you can't expect them to be backwards-compatible.

Our sad example: Once we followed a software-as-a-service platform's instructions for using their library. As they didn't have their own Python client, but an early adopter had a working implementation on GitHub, those instructions told us to put the following into our `requirements/base.txt`:

Example 23.2: How Not To List Requirements

Our mistake. We should have known better and pinned it to a particular git revision number.

Not the early adopter's fault at all, but they pushed up a broken commit to their repo. Once we had to fix a problem on a site very quickly, so we wrote a bug fix and tested it locally in development. It passed the tests. Then we deployed it to production in a process that grabs

all dependency changes; unfortunately the broken commit was interpreted as a valid change. Which meant, while fixing one bug, we crashed the site.

Not a fun day.

The purpose of using pinned releases is to add a little formality and process to our published work. Especially in Python, GitHub and other repos are a place for developers to publish their work-in-progress, not the final, stable work upon which our production-quality projects depend.

One more thing, when pinning dependencies, try to pin the dependencies of dependencies. It just makes deployment and testing that much more predictable.

23.7.3 Step 3: Install the Requirements Into Your Virtualenv

Assuming you are already in a working virtualenv and are at the `<repo_root>` of your project, you `pip install` the appropriate requirements file for your setup, e.g. `requirements/dev.txt`.

If this is the first time you've done this for a particular virtualenv, it's going to take a while for it to grab all the dependencies and install them.

23.7.4 Step 4: Follow the Package's Installation Instructions Exactly

Resist the temptation to skip steps unless you're very familiar with the package. Since open source Django package developers tend to take pride in their documentation and love to get people to use their packages, most of the time the installation instructions they've authored make it easy to get things running.

23.8 Troubleshooting Third-Party Packages

Sometimes you run into problems setting up a package. What should you do?

First, make a serious effort to determine and solve the problem yourself. Pour over the documentation and make sure you didn't miss a step. Search online to see if others have run into the same issue. Be willing to roll up your sleeves and look at the package source code, as you may have found a bug.

If it appears to be a bug, see if someone has already reported it in the package repository's issue tracker. Sometimes you'll find workarounds and fixes there. If it's a bug that no one has reported, go ahead and file it.

If you still get stuck, try asking for help in all the usual places: StackOverflow, IRC #django, the project's IRC channel if it has its own one, and your local Python user group. Be as descriptive and provide as much context as possible about your issue.

23.9 Releasing Your Own Django Packages

Whenever you write a particularly useful Django app, consider packaging it up for reuse in other projects.

The best way to get started is to follow Django's *Advanced Tutorial: How to Write Reusable Apps*, for the basics: docs.djangoproject.com/en/3.2/intro/reusable-apps/

In addition to what is described in that tutorial, we recommend that you also:

- ▶ Create a public repo containing the code. Most Django packages are hosted on GitHub these days, so it's easiest to attract contributors there, but various alternatives exist (Gitlab, Bitbucket, Assembla, etc.).
- ▶ Release the package on the Python Package Index (pypi.org). Follow the submission instructions at packaging.python.org/distributing/#uploading-your-project-to-pypi.
- ▶ Add the package to Django Packages (djangopackages.org).
- ▶ Use Read the Docs (readthedocs.io) or similar service to host your **Sphinx** documentation.

TIP: Where Should I Create a Public Repo?

There are websites that offer free source code hosting and version control for open source projects. As mentioned in [Chapter 2: The Optimal Django Environment Setup](#), GitHub or GitLab are two popular options.

When choosing alternative hosted version control services, keep in mind that pip only supports Git, Mercurial, Bazaar, and Subversion.

23.10 What Makes a Good Django Package?

Here's a checklist for you to use when creating a new open source Django package. Much of this applies to Python packages that are not Django-specific. This checklist is also helpful for when you're evaluating a Django package to use in any of your projects.

23.10.1 Purpose

Your package should do something useful and do it well. The name should be descriptive. The package repo's root folder should be prefixed with 'django-' or 'dj-' to help make it easier to find.

If part of the package’s purpose can be accomplished with a related Python package that doesn’t depend on Django, then create a separate Python package and use it as a dependency.

23.10.2 Scope

Your package’s scope should be tightly focused on one small task. This means that your application logic will be tighter, and users will have an easier time patching or replacing the package.

23.10.3 Documentation

A package without documentation is a pre-alpha package. Docstrings don’t suffice as documentation.

As described in [Chapter 25: Documentation: Be Obsessed](#), your docs should be written in **Markdown**. A nicely-formatted version of your docs should be generated with MkDocs, Sphinx, or other tools and hosted publicly. We encourage you to use [readthedocs.io](#) with webhooks so that your formatted documentation automatically updates whenever you make a change.

If your package has dependencies, they should be documented. Your package’s installation instructions should also be documented. The installation steps should be bulletproof.

23.10.4 Tests

Your package should have tests. Tests improve reliability, make it easier to advance Python/Django versions, and make it easier for others to contribute effectively. Write up instructions on how to run your package’s test suite. If you or any contributor can run your tests easily before submitting a pull request, then you’re more likely to get better quality contributions.

23.10.5 Templates

In the past, some Django packages provided instructions for creating templates in their docs in lieu of actual template files. However, nowadays it’s pretty standard for Django packages to come with a set of barebones templates that demonstrate basic functionality. Typically these templates contain only minimalist HTML, any needed JavaScript, and no CSS. The exception is for packages containing widgets that require CSS styling.

23.10.6 Activity

Your package should receive regular updates from you or contributors if/when needed. When you update the code in your repo, you should consider uploading a minor or ma-

ajor release to the Python Package Index.

23.10.7 Community

Great open source packages, including those for Django, often end up receiving contributions from other developers in the open source community. All contributors should receive attribution in a *CONTRIBUTORS.rst* or *AUTHORS.rst* file.

Be an active community leader if you have contributors or forks of your package. If your package is forked by other developers, pay attention to their work. Consider if there are ways that parts or all of their work can be merged into your fork. If the package's functionality diverges a lot from your package's purpose, be humble and consider asking the other developer to give their fork a new name.

23.10.8 Modularity

Your package should be as easily pluggable into any Django project that doesn't replace core components (templates, ORM, etc) with alternatives. Installation should be minimally invasive. Be careful not to confuse modularity with over-engineering, though.

23.10.9 Availability on PyPI

All major and minor releases of your package should be available for download from the Python Package Index. Developers who wish to use your package should not have to go to your repo to get a working version of it. Use proper version numbers per the next section.

23.10.10 Uses the Broadest Requirements Specifiers Possible

Your third-party package should specify in *setup.py* the `install_requires` argument what other libraries your package requires in the broadest terms possible. However, this is a terrible way to define a package's requirements:

Example 23.3: Narrow Requirements for a Package

The reason is dependency graphs. Every so often something that you absolutely pin to a specific version of Django or another library will break on someone else's site project. For

example, what if *icecreamratings.com* was our site and this was its deployed project's requirements.txt file, and we installed django-blarg?

Example 23.4: Requirements.txt for icecreamratings.com

```
# requirements.txt for the mythical web site 'icecreamratings.com'
Django==3.1
requests==2.13.0
django-blarg==1.0

# Note that unlike the django-blarg library , we explicitly pin
# the requirements so we have total control over the environment
```

What would happen if Bad Example 21.3 were installed to a project with Example 21.4 requirements is that the Django 3.0 requirement would overwrite the Django 3.1 specification during installation of *icecreamratings.com* requirements. As there are several backwards incompatibilities between Django 3.0 and 3.1, django-blarg could make *icecreamratings.com* site simply throw HTTP 500 errors.

Your third-party package should specify what other libraries your package requires in the broadest terms possible:

Example 23.5: Broadly Defined Package Requirements

```
# requirements for django-blarg

Django>=3.1,<3.0
requests>=2.13.0,<=3.0.0
```

Additional Reading:

- ▶ pip.pypa.io/en/stable/cli/pip_install/
- ▶ nvie.com/posts/pin-your-packages/

23.10.11 Proper Version Numbers

Like Django and Python, we prefer to adhere to the strict version of **PEP 386** naming schema. In fact we follow the '**A.B.C**' pattern. Let's go through each element:

A' represents the major version number. Increments should only happen with large changes that break backwards compatibility from the previous major version. It's not uncommon to see large API changes between versions.

'B' is the minor version number. Increments include less breaking changes, or deprecation notices about forthcoming changes.

'C' represents bug fix releases, and purists call this the 'micro' release. It's not uncommon for developers to wait until a project has its first release at this level before trying the latest major or minor release of an existing project.

For alpha, beta, or release-candidates for a project, the convention is to place this information as a suffix to the upcoming version number. So you might have:

- ▶ Django 3.2-alpha
- ▶ django-crispy-forms 1.9.1-beta

WARNING: Don't Upload Unfinished Code to PyPI

PyPI, the Python Package Index, is meant to be the place where dependable, stable packages can be harnessed to build Python projects. *PyPI is not the place for Alpha, Beta, or Release Candidate code*, especially as pip and other tools will fetch the latest release by default.

Be nice to other developers and follow the convention of only placing proper releases on PyPI.

Note: While modern versions of pip no longer install pre-releases by default, it's dangerous to expect users of code to have the latest pip version installed.

Additional Reading:

- ▶ python.org/dev/peps/pep-0386
- ▶ semver.org

23.10.12 Name

The name of the project is absolutely critical. A well-named project makes it easy to discover and remember, a poor name hides it from potential users, can scare off its use from some developer shops, and even block it from being listed on PyPI, Django Packages, and other resources.

We did cover the basics in [Section 4.2: What to Name Your Django Apps](#), but here are tips that apply to open source Django packages:

- ▶ *Check to see that the name isn't already registered on PyPI.* Otherwise, it won't be trivial to install with **pip**.

- *Check to see that the name isn't on Django Packages.* This applies only to packages designed for use with Django.
- *Don't use names that include obscenity.* While you might find them funny, it's unfortunate for others. For example a noted developer once created a library that couldn't be used at NASA until he agreed to change the name.

23.10.13 License

Your package needs a license. Preferably, for individuals it should be licensed under the **MIT** licenses, which are generally accepted for being permissive enough for most commercial or noncommercial uses. If you are worried about patents, then go with the **Apache** license.

Create a **LICENSE.rst** file in your repo root, mention the license name at the top, and paste in the appropriate text from the (OSI) approved list at choosealicense.com.

TIP: Licenses Protect You and the World

In this era of casual litigation and patent trolls adding a software license isn't just a matter of protecting your ownership of the code. It's much, much more. If you don't license your code, or use an unapproved license not vetted by real lawyers, you run the risk of your work being used as a weapon by a patent troll, or in the case of financial or medical disaster, you could be held liable.

OSI-approved licenses all include a couple critical statements on **copyright**, **redistribution**, **disclaimer of warranty**, and **limitation of liability**.

23.10.14 Clarity of Code

The code in your Django package should be as clear and simple as possible. Don't use weird, unusual Python/Django hacks without explaining what you are doing.

23.10.15 Use URL Namespaces

Described in [Section 8.4: Use URL Namespaces](#), URL namespaces allow for greater interoperability. Using means it's easier to manage collisions between projects, or even prepare for it ahead of time.

If there is concern about future collisions, settings-based URL namespace systems can be implemented. This is where the project defines its URL namespace as a setting, then provides a Django context processor and detailed instructions on use. While it's not hard to implement, it does create a level of abstraction that can make a project a little bit harder to maintain.

23.11 Creating Your Own Packages the Easy Way

Releasing your own bit of code can be a wonderfully rewarding experience. Everyone should do it!

That said, putting all the pieces together in order to make a reusable Django package is a lot of work, and it's common to get things wrong. Fortunately, **Cookiecutter** makes this easy.

PACKAGE TIP: Cookiecutter: Project Templates Made Easy

In 2013 Audrey created the popular Cookiecutter utility for generating project templates. It's easy to use and very powerful. Numerous templates exist for Python and Django packages. Even better, many IDEs such as PyCharm and Visual Studio Code now provide support for Cookiecutter-based templates.

- ▶ [github.com/cookiecutter/cookiecutter](https://github.com(cookiecutter/cookiecutter)
- ▶ cookiecutter.readthedocs.io

In the Cookiecutter templates referenced below, we have vetted them by aggressively asking for them to be reviewed by leaders in both the Django and Python communities. Just use the following bash example at the command-line:

Example 23.6: Using Cookiecutter to Jumpstart Packages

```
# Only if you haven't installed cookiecutter yet
\$ pip install cookiecutter

# Creating a Django Package from scratch
\$ cookiecutter
→ https://github.com/pydanny/cookiecutter-djangopackage.git

# Creating a Python Package from scratch
\$ cookiecutter
→ https://github.com/ionelmc/cookiecutter-pylibrary.git
```

You'll be prompted to provide information. The generated result will be an implementation of a base Django/Python/etc. package template that includes code, documentation, tests, license, and much more.

23.12 Maintaining Your Open Source Package

WARNING: Open Source Burnout and Giving Too Much

Unless you are getting paid professionally to do open source work, remember that this is volunteer work done for pleasure. Do what you can at your own pace, and just try your best.

The open source packages that you create have a life of their own. They mature over time, changing as their needs and the development standards grow over time. Here are some things we should do when maintaining open source projects:

23.12.1 Give Credit for Pull Requests

When someone submits a pull request that's accepted, treat them right. Make sure to add the contributor to a project's author document called something like *CONTRIBUTORS.md* or *AUTHORS.md*.

23.12.2 Handling Bad Pull Requests

Sometimes you get pull requests that you just have to reject. Be nice and positive about it, since a well-handled rejected pull request can make a friend for life.

Here are problematic pull requests that should be considered for rejection:

- *Any pull request that fails the tests.* Ask for fixes. See [Chapter 24: Testing Stinks and Is a Waste of Money!](#).
- *Any added code that reduces test coverage.* Again, see [chapter 24](#).
- *Pull requests should change/fix as little as possible.* Large, wide-sweeping changes in a pull request should be rejected, with comments to isolate changes in smaller, atomic pull requests.
- *Overly complex code submissions should be carefully considered.* There is nothing wrong with asking for simplification, better comments, or even rejecting an overly complex pull request.
- *Code that breaks PEP-8 needs to be resubmitted.* The Django world follows PEP-8 very closely, and so should your project. Submissions that violate PEP 8 can be requested to be improved.
- *Code changes combined with major whitespace cleanup.* If someone submits a change of two lines of code and corrects 200 lines of whitespace issues, the diff on that pull request is functionally unreadable and should be rejected. Whitespace cleanups need to be in their own pull request.

WARNING: Code Changes Combined With Major Whitespace Cleanup

We're adding a warning because this is arguably a form of code obfuscation by a third party. One could argue it's potentially a security risk. What better way to inject malignant code than through a pull request?

23.12.3 Do Formal PyPI Releases

In the Python community, it's considered irresponsible to force developers to rely on a 'stable' master or trunk branch of critical open source projects because the PyPI version is out of date. This can cause problems as open source code repositories are not considered to be good sources of production quality code. For example, which particular commit or tag should be used? On the other hand, PyPI, is a known resource designed to securely provide valid installable packages.

In the Python world, the accepted best practice is to release when significant (or even minor) changes or bug fixes happen on trunk or master. In fact, minor bug fix releases are a part of every ongoing software project and no one faults anyone for these kinds of things (except in US government IT contracts, but that's outside the scope of this book).

If you aren't sure how this works, please look at `python-request`'s change history, it being one of Python's most popular projects: github.com/psf/requests/blob/master/HISTORY.md

To create and upload your distribution, use the following steps:

Example 23.7: Using Twine to Upload Package Distributions

```
pip install twine
python setup.py sdist
twine upload dist/*
```

PACKAGE TIP: What is Twine?

Twine is the preferred library for uploading packages to PyPI. The problem with `python setup.py` is that it sends files over a non secure connection, exposing your library to a man-in-the-middle attack. In contrast, twine uses only verified TLS to upload your package.

That's not all! Twine works better at uploading Wheels (see the next subsection),

doesn't require executing the setup.py, and even pre-signs your releases. If you are seriously security minded, it's the tool of choice.

23.12.4 Create and Deploy Wheels to PyPI

According to PEP 427, Wheels are the new standard of python distribution. They are intended to replace eggs and provide a number of advantages including faster installation and allow secure digital signing. Support is offered in pip >= 1.4 and setuptools >= 0.8.

Example 23.8: Installing Wheel

```
pip install wheel
```

Then, after you've deployed your package to PyPI, run the following commands:

Example 23.9: Creating Wheel Distributions and Uploading Them

```
python setup.py bdist_wheel
twine upload dist/*
```

Twine makes universal wheels when the optional *setup.cfg* file is at the same level as *setup.py* and includes this snippet:

Example 23.10: Configuring Universal Wheels

```
# setup.cfg
[wheel]
universal = 1
```

Wheel Resources:

Specification: PEP 427 python.org/dev/peps/pep-0427

Wheel Package on PyPI pypi.org/project/wheel/

Documentation wheel.readthedocs.io

Advocacy pythonwheels.com

23.12.5 Add Git Tags to the Repo

We also like to **git tag** our releases in the repo. This is a snapshot of the code at the time the release was submitted to PyPI (see previous subsection). In addition to serving as a historical record, it can also location for installing packages from. For example, if an organization doesn't want to stand up a private package server, they can rely on git tags (or releases for those repo hosts like GitHub that provide this option).

Example 23.11: Create and Push Tag to repo

```
git tag -a v1.4 -m "my version 1.4"  
git push origin v1.4
```

Reference: git-scm.com/book/en/v2/Git-Basics-Tagging

23.12.6 Upgrade the Package to New Versions of Django

Every once in awhile, Django is updated with a minor release. Approximately once a year there is a major Django release. When this happens, it's very important to run our package's test suite in a **virtualenv** that contain Django's latest release.

If for no other reason, this is an excellent reason to include tests in your project.

23.12.7 Follow Good Security Practices

We discuss security in-depth in [Chapter 28: Security Best Practices](#). However, core Django, Python, and PyPy developer Alex Gaynor has an incredibly useful article for maintainers of any open source project:

alexgaynor.net/2013/oct/19/security-process-open-source-projects

TIP: Alex Gaynor on Security for Open Source Projects

“Security vulnerabilities put your users, and often, in turn, their users at risk. As an author and distributor of software, you have a responsibility to your users to handle security releases in a way most likely to help them avoid being exploited.”

23.12.8 Provide Sample Base Templates

Always include some basic templates for views using your project. We prefer to write either incredibly simple HTML or use a common front-end frameworks such as Bootstrap or Tailwind. This makes ‘test-driving’ the project much easier for developers who are considering

using it to solve their problems. Invariably they'll modify the templates inside their own `templates/` directory, but this just makes everything so much easier.

In addition, include a `templates/myapp/base.html` to increase interoperability. You can see a description and example of this in cookiecutter-djangopackage:

bit.ly/2onSzCV

23.12.9 Give the Package Away

Sometimes, life takes you away from maintaining a package. It might be family or a new job, but sometimes you just have no need for a particular open source project. Time considerations might mean that you don't have the ability to review pull requests or explore ideas for new features. If you're the creator of a project it can be extremely challenging to let it go.

However, by giving a project away to active maintainers, it can be reborn and prove more useful. It also earns the respect of the developer community at large.

Some notable giveaways in the Django and Python communities include:

- Ian Bicking and pip/virtualenv.
- Daniel and Audrey Roy Greenfeld and djangopackages.org
- Daniel Roy Greenfeld and django-crispy-forms, dj-stripe, and django-mongonaut
- Audrey Roy Greenfeld and Cookiecutter
- Rob Hudson and django-debug-toolbar.

23.13 Additional Reading

The following are links to useful articles for anyone contributing to, creating, or maintaining open source libraries:

- djangoappschecklist.com A personal favorite of ours, the Django Apps Checklist is a checklist for everything in this chapter.
- alexgaynor.net/2013/sep/26/effective-code-review
- hynek.me/articles/sharing-your-labor-of-love-pypi-quick-and-dirty

23.14 Summary

Django's real power is in the vast selection of third-party packages available to you for use in your Django projects.

Make sure that you have pip and virtualenv (or Poetry as an alternative) installed and know how to use them, since they're your best tools for installing packages on your system in a manageable way.

Get to know the packages that exist. The Python Package Index and Django Packages are a great starting point for finding information about packages.

Package maturity, documentation, tests, and code quality are good starting criteria when evaluating a Django package.

Installation of stable packages is the foundation of Django projects big and small. Being able to use packages means sticking to specific releases, not just the trunk or master of a project. Barring a specific release, you can rely on a particular commit. Fixing problems that a package has with your project takes diligence and time, but remember to ask for help if you get stuck.

We also covered how to create your own third-party package, and provided basic instruction on how to use cookiecutter to jump-start you on your way to releasing something on the Python Package Index. We also included instructions on using the new Wheel format.

Finally, we provided guidance on how to maintain a package.

24 | Testing Stinks and Is a Waste of Money!

There, got you to this chapter.

Now you have to read it.

We'll try and make this chapter interesting.

24.1 Testing Saves Money, Jobs, and Lives

Daniel's Story: Ever hear the term "smoke test"?

Gretchen Davidian, a Management and Program Analyst at **NASA**, told me that when she was still an engineer, her job as a tester was to put equipment intended to get into space through such rigorous conditions that they would begin emitting smoke and eventually catch on fire.

That sounds exciting! Employment, money, and lives were on the line, and knowing Gretchen's attention to detail, I'm sure she set a lot of hardware on fire.

Keep in mind that for a lot of us, as software engineers, the same risks are on the line as NASA. I recall in 2004 while working for a private company how a single miles-vs-kilometers mistake cost a company hundreds of thousands of dollars in a matter of hours. Quality Assurance (QA) staff lost their jobs, which meant that money and health benefits were gone. In other words, employment, money, and possibly lives can be lost without adequate tests. While the QA staff were very dedicated, everything was done via manually clicking through projects, and human error simply crept into the testing process.

Today, as Django moves into a wider and wider set of applications, the need for automated testing is just as important as it was for Gretchen at NASA and for the poor QA staff in 2004. Here are some cases where Django is used today that have similar quality requirements:

- Applications that handle medical information.
- Applications that provide life-critical resources to people in need.
- Applications working with user's financial information.

PACKAGE TIP: Useful Library for Testing Django Projects

We like to use **coverage.py**.

This tool provides clear insight into what parts of your code base are covered by tests, and what lines haven't been touched by tests. You also get a handy percentage of how much of your code is covered by tests. Even 100% test coverage doesn't guarantee a bug-free application, but it helps.

We want to thank Ned Batchelder for his incredible work in maintaining coverage.py. It's a superb project and is useful for any Python-related project.

24.2 How to Structure Tests

Let's say we've just created a new Django app. The first thing we do is delete the default but useless *tests.py* module that `python manage.py startapp` creates. In its place we create a directory called *tests* and place an empty *__init__.py* within.

Inside that new directory, because most apps need them, we create *test_forms.py*, *test_models.py*, *test_views.py* modules. Tests that apply to forms go into *test_forms.py*, model tests go into *test_models.py*, and so on.

Here's what it looks like:

Example 24.1: How to Structure Tests

```
popsicles/
    __init__.py
    admin.py
    forms.py
    models.py
    tests/
        __init__.py
        test_forms.py
        test_models.py
        test_views.py
    views.py
```

Also, if we have other files besides `forms.py`, `models.py` and `views.py` that need testing, we create corresponding test files.

We like this approach because while it does add an extra layer of nesting, the alternative is to have an app structure with a painful number of modules to navigate.

TIP: Prefix Test Modules With `test_`

It's critically important that we always prefix test modules with `test_`, otherwise Django's test runner can't trivially discover our test files. Also, it's a nice convention that allows for greater flexibility for viewing filenames in IDEs and text editors. As always, never lean on your preferred IDE for how to name things.

24.3 How to Write Unit Tests

It's not uncommon for programmers to feel at the top of their game at the moment they are writing code. When they revisit that same code in months, weeks, days, or even hours and it's not uncommon for programmers to feel as if that same code is of poor quality.

The same applies to writing unit tests.

Over the years, we've evolved a number of practices we like to follow when writing tests, including **unit tests**. Our goal is always to write the most meaningful tests in the shortest amount of time. Hence the following:

24.3.1 Each Test Method Tests One Thing

A test method must be extremely narrow in what it tests. A single unit test *should never* assert the behavior of multiple views, models, forms, or even multiple methods within a class. Instead, a single test should assert the behavior of a single view, model, form, method, or function.

Therein lies a conundrum. How does one run a test for a view, when views often require the use of models, forms, methods, and functions?

The trick is to be absolutely minimalistic when constructing the environment for a particular test, as shown in the example below:

Example 24.2: Testing Just One Thing

```
# flavors/tests/test_api.py
import json
```

```
from django.test import TestCase
from django.urls import reverse

from flavors.models import Flavor

class FlavorAPITests(TestCase):

    def setUp(self):
        Flavor.objects.get_or_create(title='A Title',
                                    slug='a-slug')

    def test_list(self):
        url = reverse('flavors:flavor_object_api')
        response = self.client.get(url)
        self.assertEqual(response.status_code, 200)
        data = json.loads(response.content)
        self.assertEqual(len(data), 1)
```

In this test, taken from code testing the API we presented in [Section 17.2: Illustrating Design Concepts With a Simple API](#), we use the `setUp()` method to create the minimum possible number of records needed to run the test.

Here's a much larger example, one based on the REST API example that we provided in [Chapter 17: Building REST APIs With Django REST Framework](#).

Example 24.3: Testing API Code

```
# flavors/tests/test_api.py
import json

from django.test import TestCase
from django.urls import reverse

from flavors.models import Flavor

class DjangoRestFrameworkTests(TestCase):

    def setUp(self):
        Flavor.objects.get_or_create(title='title1', slug='slug1')
```

```

Flavor.objects.get_or_create(title='title2', slug='slug2')

self.create_read_url = reverse('flavors:flavor_rest_api')
self.read_update_delete_url = \
    reverse('flavors:flavor_rest_api', kwargs={'slug':
        'slug1'})

def test_list(self):
    response = self.client.get(self.create_read_url)

    # Are both titles in the content?
    self.assertContains(response, 'title1')
    self.assertContains(response, 'title2')

def test_detail(self):
    response = self.client.get(self.read_update_delete_url)
    data = json.loads(response.content)
    content = {'id': 1, 'title': 'title1', 'slug': 'slug1',
               'scoops_remaining': 0}
    self.assertEqual(data, content)

def test_create(self):
    post = {'title': 'title3', 'slug': 'slug3'}
    response = self.client.post(self.create_read_url, post)
    data = json.loads(response.content)
    self.assertEqual(response.status_code, 201)
    content = {'id': 3, 'title': 'title3', 'slug': 'slug3',
               'scoops_remaining': 0}
    self.assertEqual(data, content)
    self.assertEqual(Flavor.objects.count(), 3)

def test_delete(self):
    response = self.client.delete(self.read_update_delete_url)
    self.assertEqual(response.status_code, 204)
    self.assertEqual(Flavor.objects.count(), 1)

```

24.3.2 For Views, When Possible Use the Request Factory

The `django.test.client.RequestFactory` provides a way to generate a request instance that can be used as the first argument to any view. This provides a greater amount of isolation than the standard Django test client, but it does require a little bit of extra work on

the part of the test writer. This is because the request factory doesn't support middleware, including session and authentication.

See docs.djangoproject.com/en/3.2/topics/testing/advanced/

Unfortunately the documentation doesn't cover when you want to test a view wrapped with a single middleware class. For example, if a view required sessions, this is how we would do it:

Example 24.4: How to Add Middleware to Requests and Responses

```
from django.contrib.auth.models import AnonymousUser
from django.contrib.sessions.middleware import SessionMiddleware
from django.test import TestCase, RequestFactory

from .views import cheese_flavors

def add_middleware_to_request(request, middleware_class):
    middleware = middleware_class()
    middleware.process_request(request)
    return request

def add_middleware_to_response(request, middleware_class):
    middleware = middleware_class()
    middleware.process_response(request)
    return request

class SavoryIceCreamTest(TestCase):
    def setUp(self):
        # Every test needs access to the request factory.
        self.factory = RequestFactory()

    def test_cheese_flavors(self):
        request = self.factory.get('/cheesy/broccoli/')
        request.user = AnonymousUser()

        # Annotate the request object with a session
        request = add_middleware_to_request(request,
                                         SessionMiddleware)
        request.session.save()

        # process and test the request
```

```
response = cheese_flavors(request)
self.assertContains(response, 'bleah!')
```

24.3.3 Don't Write Tests That Have to Be Tested

Tests should be written as simply as possible. If the code in a test (or the code called to help run a test) feels complicated or abstracted, then we have a problem. In fact, we ourselves are guilty of writing overly complicated utility test functions that required their own tests in the past. As one can imagine, this made debugging the actual tests a nightmare.

24.3.4 Don't Repeat Yourself Doesn't Apply to Writing Tests

The `setUp()` method is really useful for generating reusable data across all test methods in a test class. However, sometimes we need similar but different data between test methods, which is where we often fall into the trap of writing fancy test utilities. Or worse, we decide that rather than write 20 similar tests, we can write a single method that when passed certain arguments will handle all the work for us.

Our favorite method of handling these actions is to just dig in and write the same or similar code multiple times. In fact, we'll quietly admit to copy/pasting code between tests to expedite our work.

TIP: Our Problem With the Django Testing Tutorial #5

The official Django beginner tutorial on testing demonstrates the implementation of a `create_question()` utility method, which is designed to take some of the repetition out of the process of creating questions.

We think its inclusion in the tutorial is a mistake. Simple examples in the official documentation that follow poor practice provide encouragement that often play out in terrible ways. We've encountered projects inspired by this example to add deep layers of abstraction to their testing code, abstraction that makes it incredibly challenging to correct and enhance existing tests.

Again, Don't Repeat Yourself doesn't apply to tests.

24.3.5 Don't Rely on Fixtures

We've learned over time that using fixtures is problematic. The problem is that fixtures are hard to maintain as a project's data changes over time. Modifying JSON-formatted files to match your last migration is hard, especially as it can be difficult to identify during the JSON

load process where your JSON file(s) is either broken or a subtly inaccurate representation of the database.

Rather than wrestle with fixtures, we've found it's easier to write code that relies on the ORM. Other people like to use third-party packages.

PACKAGE TIP: Tools to Generate Test Data

The following are popular tools for test data generation:

- **factory boy** A package that generates model test data.
- **faker** This package generates test data, but rather than a random jumble of text, it creates localized names, addresses, and text. It even comes with instructions on how to integrate it with factory boy: faker.readthedocs.io/en/master/#how-to-use-with-factory-boy
- **model bakery** Another package that generates model test data.
- **mock** Not explicitly for Django, this allows us to replace parts of our system with mock objects. This project made its way into the standard library as of Python 3.3.

24.3.6 Things That Should Be Tested

Everything! Seriously, test whatever is possible to test, including:

Views: Viewing of data, changing of data, and custom class-based view methods.

Models: Creating/updating/deleting of models, model methods, model manager methods.

Forms: Form methods, clean() methods, and custom fields.

Validators: Really dig in and write multiple test methods against each custom validator you write. Pretend you are a malignant intruder attempting to damage the data in the site.

Signals: Since they act at a distance, signals can cause grief especially if you lack tests on them.

Filters: Since filters are essentially just functions accepting one or two arguments, writing tests for them should be easy.

Template Tags: Since template tags can do anything and can even accept template context, writing tests often become much more challenging. This means you really need to test them, since otherwise you may run into edge cases.

Miscellany: Context processors, middleware, email, and anything else not covered in this list.

Failure What happens when any of the above fail? Testing for system error is as important as testing for system success.

The only things that shouldn't be tested are parts of your project that are already covered by tests in core Django and third-party packages. For example, a model's fields don't have to be tested if you're using Django's standard fields as-is. However, if you're creating a new type of field (e.g. by subclassing `FileField`), then you should write detailed tests for anything that could go wrong with your new field type.



Figure 24.1: Test as much of your project as you can, as if it were free ice cream.

24.3.7 Test for Failure

Let's say we have a view that allows users to edit their own ice cream shop reviews. Typical tests involve logging in, attempting to change the review, and then checking whether they've actually changed. Test success, coverage 100%. Right?

However, this only tests part of the scenario. What if the user isn't logged in? What if the user is trying to edit someone else's review? Does the view produce an error and most importantly: is the object left unchanged? It has been argued that this test is even more important than the success scenario: a failure in the success scenario will cause inconvenience for users but will be reported. A failure in the fail scenario will cause a silent security hole that could go undetected until it's too late.

This is only a sampling of the things that can go wrong when we don't test for what happens when our systems break down. It is up to us to learn how to test for the exceptions our code

may throw:

- docs.python.org/2/library/unittest.html#unittest.TestCase.assertRaises
- <https://docs.pytest.org/en/latest/how-to/assert.html#assert>
PyTest assertion docs

24.3.8 Use Mock to Keep Unit Tests From Touching the World

Unit tests are not supposed to test things external to the function or method they are calling. Which means that during tests we should not access external APIs, receive emails or webhooks, or anything that is not part of the tested action. Alas, this causes a conundrum when you are trying to write a unit test for a function that interacts with an external API.

At this point you have two choices:

- Choice #1: Change the unit test to be an Integration Test.
- Choice #2: Use the **Mock** library to fake the response from the external API.

The Mock library, created by Michael Foord, has as one of its features the capability to briefly monkey-patch libraries in order to make them return the exact value that we want. This way we are testing not the availability of the external API, but instead just the logic of our code.

In the example displayed below, we are monkey-patching a function in a mythical Ice Cream API library so our test code doesn't access anything external to our application.

Example 24.5: Using Mock to Keep Unit Tests From Touching the World

```
from unittest import mock, TestCase

import icecreamapi

from flavors.exceptions import CantListFlavors
from flavors.utils import list_flavors_sorted

class TestIceCreamSorting(TestCase):

    # Set up monkeypatch of icecreamapi.get_flavors()
    @mock.patch.object(icecreamapi, 'get_flavors')
    def test_flavor_sort(self, get_flavors):
```

```

# Instructs icecreamapi.get_flavors() to return an
# unordered list.
get_flavors.return_value = ['chocolate', 'vanilla',
                           'strawberry', ]

# list_flavors_sorted() calls the icecreamapi.get_flavors()
# function. Since we've monkeypatched the function, it
# will always
# return ['chocolate', 'strawberry', 'vanilla', ]. Which
# is
# list_flavors_sorted() will sort alphabetically
flavors = list_flavors_sorted()

self.assertEqual(
    flavors,
    ['chocolate', 'strawberry', 'vanilla', ]

)

```

Now let's demonstrate how to test the behavior of the `list_flavors_sorted()` function when the Ice Cream API is inaccessible.

Example 24.6: Testing For When API is Unavailable

```

@mock.patch.object(icecreamapi, 'get_flavors')
def test_flavor_sort_failure(self, get_flavors):
    # Instructs icecreamapi.get_flavors() to throw a FlavorError.
    get_flavors.side_effect = icecreamapi.FlavorError()

    # list_flavors_sorted() catches the icecreamapi.FlavorError()
    # and passes on a CantListFlavors exception.
    with self.assertRaises(CantListFlavors):
        list_flavors_sorted()

```

As an added bonus for API authors, here's how we test how code handles two different `python-requests` connection problems:

Example 24.7: Testing python-requests Connection Failures

```
@mock.patch.object(requests, 'get')
def test_request_failure(self, get):
    """Test if the target site is inaccessible."""
    get.side_effect = requests.exception.ConnectionError()

    with self.assertRaises(CantListFlavors):
        list_flavors_sorted()

@mock.patch.object(requests, 'get')
def test_request_failure_ssl(self, get):
    """Test if we can handle SSL problems elegantly."""
    get.side_effect = requests.exception.SSLError()

    with self.assertRaises(CantListFlavors):
        list_flavors_sorted()
```

24.3.9 Use Fancier Assertion Methods

Comparing two lists (or tuples) is a very common use case. However, if the lists are allowed to have different sort orders, then we have to sort the lists to match, then run `self.assertEqual(control_list, candidate_list)` right?

Not if we know to use `unittest`'s `assertItemsEqual()` assertion method! In fact, Python and Django's unittest documentation includes handy links to the very useful assertion types we get for free:

- ▶ docs.python.org/3/library/unittest.html#assert-methods
- ▶ docs.djangoproject.com/en/3.2/topics/testing/tools/#assertions

We've found the following assert methods extremely useful:

- ▶ `assertRaises`
- ▶ `assertRaisesMessage()`
- ▶ `assertCountEqual()`
- ▶ `assertDictEqual()`
- ▶ `assertFormError()`
- ▶ `assertContains()` Check status 200, checks in `response.content`.
- ▶ `assertHTMLEqual()` Amongst many things, ignores whitespace differences.
- ▶ `assertInHTML()` Great for confirming a tiny bit of HTML in a giant HTML page.

- ▶ `assertJSONEqual()`
- ▶ `assertURLEqual()`

24.3.10 Document the Purpose of Each Test

Just as it is a good idea to document the purpose of a class, method, or function with docstrings, it is also a good idea to document the purpose of the test analogs of these items. If undocumented code makes a project somewhat harder to maintain, undocumented test code can make a project impossible to test. To remedy this, a little bit of docstring can go a long way.

If one thinks this is boring, well, we've found that a good way to deal with an impossible-to-debug problem is to document the related tests. By the time the tests are documented, we have either figured out the problem or we have documented tests. Either case is a win!

Resources:

- ▶ hynek.me/articles/document-your-tests/
- ▶ interrogate.readthedocs.io/ - A library that checks code bases for missing docstrings

24.4 What About Integration Tests?

Integration testing is when individual software modules are combined and tested as a group. This is best done after unit tests are complete. Examples of integration tests can include:

- ▶ Selenium tests to confirm that an application works in the browser.
- ▶ Actual testing against a third-party API instead of mocking responses. For example, Django Packages conducts periodic tests against GitHub and the PyPI API to ensure that its interaction with those systems is valid.
- ▶ Interacting with httpbin.org to confirm the validity of outbound requests.
- ▶ Using runscope.com or postman.com to validate that our API is working as expected.

Integration tests are a great way to confirm that ‘all the pieces’ are working. We can confirm that our users will see what they are supposed to see and our APIs are functioning correctly.

The downside of integration tests are:

- ▶ Setting up integration tests can take a lot of time.
- ▶ Compared to unit tests, integrations are extremely slow. That's because instead of testing the smallest components, integration tests are, by definition, testing the whole system.

- When errors are thrown by integration tests, uncovering the problem is harder than unit tests. For example, a problem affecting a single type of browser might be caused by a unicode transformation happening at the database level.
- Integration tests are fragile compared to unit tests. A small change in a component or setting can break them. We've yet to work on a significant project where at least one person wasn't forever blocked from running them successfully.

Even with these problems, integration tests are useful and worth considering adding to our testing stack.

24.5 Continuous Integration

For projects of any size, we recommend setting up a continuous integration (CI) server to run the project's test suite whenever code is committed and pushed to the project repo. See [Chapter 34: Continuous Integration](#) for more details.

24.6 Who Cares? We Don't Have Time for Tests!

“Tests are the Programmer’s stone, transmuting fear into boredom.”

—Kent Beck

Let's say you are confident of your coding skill and decide to skip testing to increase your speed of development. Or maybe you feel lazy. It's easy to argue that even with test generators and using tests instead of the shell, they can increase the time to get stuff done.

Oh, really?

What about when it's time to upgrade?

That's when the small amount of work you did up front to add tests saves you a lot of work.

For example, in the summer of 2010, Django 1.2 was the standard when we started Django Packages (djangopackages.org). Since then the project has stayed current with new Django versions, which has been really useful. Because of its pretty good test coverage, moving it up a version of Django (or the various dependencies) has been easy. Our path to upgrade:

- Upgrade the version in a local instance of Django Packages.
- Run the tests.
- Fix any errors that are thrown by the tests.
- Do some manual checking.

If Django Packages didn't have tests, any time we upgraded *anything* we would have to click through dozens and dozens of scenarios manually, which is error-prone. Having tests means we can make changes and dependency upgrades with the confidence that our users (i.e. the Django community) won't have to deal with a buggy experience.

This is the benefit of having tests.

24.7 The Game of Test Coverage

A great, fun game to play is trying get **test coverage** as high as possible. Every day that we increase our test coverage is a victory, and every day that the coverage goes down is a loss.

24.8 Setting Up the Test Coverage Game

Yes, we call test coverage a game. It's a good tool for developers to push themselves. It's also a nice metric that both developers and their clients/employers/investors can use to help evaluate the status of a project.

We advocate following these steps because most of the time we want to only test our own project's apps, not all of Django, and the myriad of third-party libraries that are the building blocks of our project. Testing those 'building blocks' takes an enormous amount of time, which is a waste because most are already tested or require additional setup of resources.

24.8.1 Step 1: Start Writing Tests

We've done that already, right?

24.8.2 Step 2: Run Tests and Generate Coverage Report

Let's try it out! In the command-line, at the <*project_root*>, type:

Example 24.8: Running Django tests using coverage.py

```
$ coverage run manage.py test --settings=twoscoops.settings.test
```

If we have nothing except for the default tests for two apps, we should get a response that looks like:

Example 24.9: Positive Test Results

```
Creating test database for alias "default"...
..
-----
Ran 2 tests in 0.008s
```

```
OK
```

```
Destroying test database for alias "default"...
```

This doesn't look like much, but what it means is that we've constrained our application to only run the tests that you want. Now it's time to go and look at and analyze our embarrassingly low test coverage numbers.

24.8.3 Step 3: Generate the Report!

`coverage.py` provides a very useful method for generating HTML reports that don't just provide percentage numbers of what's been covered by tests, it also shows us the places where code is not tested. In the command-line, at the `<project_root>`:

Example 24.10: Test Results Without `admin.py`

```
$ coverage html --omit="admin.py"
```

Ahem...don't forget to change `<project-root>` to match the development machine's structure! For example, depending on where one does things, the `<path-to-project-root>` could be:

- `/Users/audreyr/code/twoscoops/twoscoops/`
- `/Users/pydanny/projects/twoscoops/twoscoops/`
- `c:\twoscoops`

After this runs, in the `<project_root>` directory there is a new directory called `htmlcov/`. In the `htmlcov/` directory, open the `index.html` file using any browser.

What is seen in the browser is the test results for our test run. Unless we already wrote some tests, the total on the front page will be in the single digits, if not at 0%. Click into the various modules listed and we should see lots of code that's red-colored. *Red is bad.*

Let's go ahead and admit that our project has a low coverage total. If your project has a low coverage total, you need to admit it as well. It's okay just so long as we also resolve to improve the coverage total.

In fact, there is nothing wrong in saying publicly that you are working to improve a project's test coverage. Then, other developers (including ourselves) will cheer you on!

24.9 Playing the Game of Test Coverage

The game has a single rule:

Mandate that no commit can lower test coverage.

If we add a feature or bug fix and coverage is 65% when we start, we can't merge our code in until coverage is at least 65% again. At the end of each day, if test coverage goes up by any amount, it means we're winning.

Keep in mind that the gradual increase of test coverage can be a very good thing over huge jumps. Gradual increases can mean that we developers aren't putting in bogus tests to bump up coverage numbers; instead, we are improving the quality of the project.

24.10 Alternatives to unittest

All the examples in this chapter thus far have used the unittest library. While every known authority on testing agrees that unittest is a very powerful, useful tool, not all of them like it. The specific reason, and one we fully comprehend, is that it requires too much boilerplate.

Fortunately, there is the pytest alternatives that requires a lot less boilerplate: pypi.org/project/pytest-django/

This library is a wrapper around the **pytest** library. In return for a little bit of extra setup, this allows for not just the running of unittest-based tests, but also for running any function (and class/directory/module) prefixed with “**test_**”. For example, you could write a simple test that looks like this:

Example 24.11: py.test example

```
# test_models.py
from pytest import raises

from cones.models import Cone

def test_good_choice():
    assert Cone.objects.filter(type='sugar').count() == 1

def test_bad_cone_choice():
    with raises(Cone.DoesNotExist):
        Cone.objects.get(type='spaghetti')
```

While this example is based on pytest, similar functionality can be used with nose and it's `nose.tools.raises` decorator.

A possible downside of the simplicity of these function-based tests is the lack of inheritance. If a project needs to have similar behavior over a lot of different tests, then writing tests this way may not make sense.

24.11 Summary

All of this might seem silly, but testing can be very serious business. In a lot of developer groups this subject, while gamified, is taken very seriously. Lack of stability in a project can mean the loss of clients, contracts, and even employment.

In the next chapter we cover a common obsession of Python developers: documentation.

25 | Documentation: Be Obsessed

Given a choice between ice cream and writing great documentation, most Python developers would probably choose to write the documentation. That being said, writing documentation while eating ice cream is even better.

When you have great documentation tools like **Markdown**, **MkDocs**, **Sphinx**, **Myst-Parser** for Sphinx, and you actually can't help but want to add docs to your projects.

25.1 Use GitHub-Flavored Markdown for Docs

You'll want to learn and follow the standard best practices for documentation. These days, GitHub-Flavored Markdown (**GFM**) is the most common *markup* language used for documenting Python projects. Other tools and companies have adopted GFM, for example, GitLab uses GFM in their READMEs and issue trackers.

Here is the formal GFM specification and a sample project which benefits from using it:

- ▶ github.github.com/gfm/
- ▶ django-rest-framework.org/

While it's possible to study the formal documentation for GFM and learn the basics, here is a quick primer of some very useful commands you should learn.

Example 25.1: Markdown Primer

```
# H1 Header

**emphasis (bold/strong)**

*italics*

underline_
```

```
link: [Two Scoops Press](https://twoscoopspress.com)
```

Note: The secret to links in Markdown is think of it like a
→ function call. The link in the parenthesis is the value being
→ called.

```
## Section Header
```

```
#. An enumerated list item  
#. Second item
```

```
- First bullet
```

```
- Second bullet
```

```
- Indented Bullet
```

```
- Note carriage return and indents
```

```
Literal code block:
```

```
``` python  
def like():
 print("I like Ice Cream")

for i in range(10):
 like()
```
```

```
JavaScript colored code block:
```

```
``` js  
console.log("Don't use alert()");
```
```

25.2 Use MkDocs or Sphinx with Myst to Generate Documentation From Markdown

MkDocs and Sphinx with Myst are static site generators which render nice-looking docs from your `.md` files. Output formats include **HTML**, **LaTeX**, manual pages, and plain text.

MkDocs should just work per the usage instructions at mkdocs.org/#getting-started

For Sphinx, you'll need to follow the Myst instructions to generate markdown docs: <https:////myst-parser.readthedocs.io/en/latest/using/intro.html>.

TIP: Build Your Documentation at Least Weekly

You never know when bad cross-references or invalid formatting can break the documentation build. Rather than discover that the documentation is unbuildable at an awkward moment, just make a habit of creating it on a regular basis. Our preference is to make it part of our Continuous Integration processes, as covered in [Chapter 34: Continuous Integration](#).

PACKAGE TIP: Other Documentation Generators

We list the two main Python-based documentation site generators, but if one is willing to explore non-python options, there are numerous other open source and commercial documentation alternatives. Here is a quick list of some excellent ones we've used in the past few years:

- docusaurus.io
- docsify.js.org
- bookdown.org

25.3 What Docs Should Django Projects Contain?

Developer-facing documentation refers to notes and guides that developers need in order to set up and maintain a project. This includes notes on installation, deployment, architecture, how to run tests or submit pull requests, and more. We've found that it really helps to place this documentation in all our projects, private or public.

Here we provide a table that describes what we consider the absolute minimum documentation:

| Filename or Directory | Reason | Notes |
|-----------------------------|--|---|
| <i>README.md</i> | Every coding project you begin regardless of framework or language should have a <i>README.md</i> file in the repository root. | Provide at least a short paragraph describing what the project does. Also, link to the installation instructions in the <i>docs/</i> directory. |
| <i>docs/</i> | Your project documentation should go in one, consistent location. This is the Python community standard. | A simple directory. |
| <i>docs/deployment.md</i> | This file lets you take a day off. | A point-by-point set of instructions on how to install/update the project into production, even if it's done via something powered by various devops tools that in theory make it "simple", document it here. |
| <i>docs/installation.md</i> | This is really nice for new people coming into a project or when you get a new laptop and need to set up the project. | A point-by-point set of instructions on how to onboard yourself or another developer with the software setup for a project. |
| <i>docs/architecture.md</i> | A guide for understanding what things evolved from as a project ages and grows in scope. | This is how you imagine a project to be in simple text and it can be as long or short as you want. Good for keeping focused at the beginning of an effort. |

Table 25.1: Documentation Django Projects Should Contain

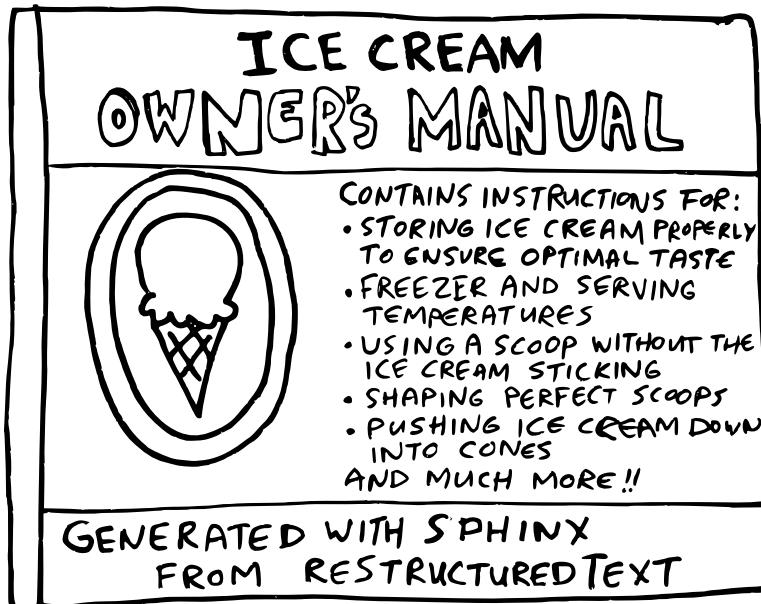


Figure 25.1: Even ice cream could benefit from documentation.

25.4 Additional Markdown Documentation Resources

- python.org/dev/peps/pep-0257 Official specification on docstrings.
- readthedocs.io Read the Docs is a free service that can host your Sphinx or MkDocs documentation.
- pythonhosted.org Python Hosted is another free service for documentation hosting.
- en.wikipedia.org/wiki/Markdown
- documentup.com will host README documents written in Markdown format.

25.5 The ReStructuredText Alternative

ReStructuredText is a plain text formatting syntax not too dissimilar to Markdown. It has a lot more built-in features than Markdown but is harder to learn and slower to write. It is used by core tools such as Django, Python and many older third-party libraries .

25.5.1 ReStructuredText Resources

- docutils.sourceforge.net/docs/ref/rst/restructuredtext.html is the formal specification for reStructuredText.
- docs.readthedocs.io/en/stable/intro/getting-started-with-sphinx.html - ReadTheDoc's starting instructions for Sphinx.
- sphinx-doc.org/ is the Sphinx project home page. While usable with Markdown, Sphinx really shines when used with ReStructuredText.

25.6 When Documentation Needs to Be Convert to/from Markdown or ReStructuredText

Pandoc is a command-line tool that allows us to convert files from one markup format into another. We can write in one format, and quickly convert it to another. Here's how to convert files using this tool:

Example 25.2: Using Pandoc to convert between formats

```
\$ # To convert a ReStructuredText document to GitHub-Flavored
→ Markdown
\$ pandoc -t gfm README.rst -o README.md
\$ # To convert a Markdown document to ReStructuredText
\$ pandoc -f gfm README.md -o README.rst
```

Pandoc's documentation is found at pandoc.org.

25.7 Wikis and Other Documentation Methods

For whatever reason, if you can't place developer-facing documentation in the project itself, you should have other options. While wikis, online document stores, and word processing documents don't have the feature of being placed in version control, they are better than no documentation.

Please consider creating documents within these other methods with the same names as the ones we suggested in the table on the previous page.

25.8 Ensuring that Code is Documented

Even with unambiguous naming patterns and type hints, it can be hard to determine what a particular class, method, or function does. This is where docstrings have saved the day for so many over the years. To make enforcing this level of documentation easier, use the Interrogate library.

interrogate.readthedocs.io/

25.9 Summary

In this chapter we went over the following:

- The use of Markdown to write documentation in plaintext format.
- The use of static site generators to render your documentation in HTML. Some tools enable rendering docs as epub, mobi, or PDF.
- Advice on the documentation requirements for any Django project.

- Using ReStructuredText as a documentation alternative.
- Pandoc as a tool to convert between formats.
- Enforcing documentation with Interrogate.

Next, we'll take a look at common bottlenecks in Django projects and ways to deal with them.

26 | Finding and Reducing Bottlenecks

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

This chapter covers a few basic strategies for identifying bottlenecks and speeding up your Django projects.

26.1 Should You Even Care?

Remember, premature optimization is bad. If your site is small- or medium-sized and the pages are loading fine, then it's okay to skip this chapter.

On the other hand, if your site's user base is growing steadily or you're about to land a strategic partnership with a popular brand, then read on.

26.2 Speed Up Query-Heavy Pages

This section describes how to reduce bottlenecks caused by having too many queries, as well as those caused by queries that aren't as snappy as they could be.

We also urge you to read up on database access optimization in the official Django docs: docs.djangoproject.com/en/3.2/topics/db/optimization/

26.2.1 Find Excessive Queries With Django Debug Toolbar

You can use `django-debug-toolbar` to help you determine where most of your queries are coming from. You'll find bottlenecks such as:

- ▶ Duplicate queries in a page.
- ▶ ORM calls that resolve to many more queries than you expected.
- ▶ Slow queries.

You probably have a rough idea of some of the URLs to start with. For example, which pages don't feel snappy when they load?

Install django-debug-toolbar locally if you don't have it yet. Look at your project in a web browser, and expand the SQL panel. It'll show you how many queries the current page contains.

PACKAGE TIP: Packages for Profiling and Performance Analysis

django-debug-toolbar is a critical development tool and an invaluable aid in page-by-page analysis. We also recommend adding **django-cache-panel** to your project, but only configured to run when *settings/local.py* module is called. This will increase visibility into what your cache is doing.

django-extensions comes with a tool called `RunProfileServer` that starts Django's runserver command with hotshot/profiling tools enabled.

silk (github.com/mtford90/silk) Silk is a live profiling Django app that intercepts and stores HTTP requests and database queries before presenting them in a user interface for further inspection.

26.2.2 Reduce the Number of Queries

Once you know which pages contain an undesirable number of queries, figure out ways to reduce that number. Some of the things you can attempt:

- ▶ Try using `select_related()` in your ORM calls to combine queries. It follows `ForeignKey` relations and combines more data into a larger query. If using CBVs, **django-braces** makes doing this trivial with the `SelectRelatedMixin`. Beware of queries that get too large by explicitly passing the related field names you are interested in. Only the specified relations will be followed. Combine that with careful testing!
- ▶ For many-to-many and many-to-one relationships that can't be optimized with `select_related()`, explore using `prefetch_related()` instead.
- ▶ If the same query is being generated more than once per template, move the query into the Python view, add it to the context as a variable, and point the template ORM calls at this new context variable.

- Implement caching using a key/value store such as **Memcached** or **Redis**. Then write tests to assert the number of queries run in a view. See docs.djangoproject.com/en/3.2/topics/testing/tools/#django.test.TransactionTestCase.assertNumQueries for instructions.
- Use the `django.utils.functional.cached_property` decorator to cache in memory the result of method call for the life of an object instance. This is incredibly useful, so please see [Section 31.3.5: django.utils.functional.cached_property](#) in [chapter 31](#).

26.2.3 Speed Up Common Queries

The length of time it takes for individual queries can also be a bottleneck. Here are some tips, but consider them just starting points:

- Make sure your indexes are helping speed up your most common slow queries. Look at the raw SQL generated by those queries, and index on the fields that you filter/sort on most frequently. Look at the generated `WHERE` and `ORDER_BY` clauses.
- Understand what your indexes are actually doing in production. Development machines will never perfectly replicate what happens in production, so learn how to analyze and understand what's really happening with your database.
- Look at the query plans generated by common queries.
- Turn on your database's slow query logging feature and see if any slow queries occur frequently.
- Use `django-debug-toolbar` in development to identify potentially-slow queries defensively, before they hit production.

Once you have good indexes, and once you've done enough analysis to know which queries to rewrite, here are some starting tips on how to go about rewriting them:

- ❶ Rewrite your logic to return smaller result sets when possible.
- ❷ Re-model your data in a way that allows indexes to work more effectively.
- ❸ Drop down to raw `SQL` in places where it would be more efficient than the generated query.

TIP: Use EXPLAIN ANALYZE / EXPLAIN

If you're using PostgreSQL, you can use `EXPLAIN ANALYZE` to get an extremely detailed query plan and analysis of any raw `SQL` query. For more information, see:

- revsys.com/writings/postgresql-performance.html
- craigkerstiens.com/2013/01/10/more-on-postgres-performance/

The MySQL equivalent is the EXPLAIN command, which isn't as detailed but is still helpful. For more information, see:

► dev.mysql.com/doc/refman/5.7/en/explain.html

A nice feature of django-debug-toolbar is that the SQL pane has an EXPLAIN feature.

26.2.4 Switch ATOMIC_REQUESTS to False

The clear, vast majority of Django projects will run just fine with the setting of ATOMIC_REQUESTS to True. Generally, the penalty of running all database queries in a transaction isn't noticeable. However, if your bottleneck analysis points to transactions causing too much delay, it's time to change the project run as ATOMIC_REQUESTS to False. See [Section 7.7.2: Explicit Transaction Declaration](#) for guidelines on this setting.

26.3 Get the Most Out of Your Database

You can go a bit deeper beyond optimizing database access. Optimize the database itself! Much of this is database-specific and already covered in other books, so we won't go into too much detail here.

26.3.1 Know What Doesn't Belong in the Database

Frank Wiles of Revolution Systems taught us that there are two things that should never go into any large site's relational database:

Logs. Don't add logs to the database. Logs may seem OK on the surface, especially in development. Yet adding this many writes to a production database will slow their performance. When the ability to easily perform complex queries against your logs is necessary, we recommend third-party services such as Splunk or Loggly, or use of document-based NoSQL databases.

Ephemeral data. Don't store ephemeral data in the database. What this means is data that requires constant rewrites is not ideal for use in relational databases. This includes examples such as `django.contrib.sessions`, `django.contrib.messages`, and `metrics`. Instead, move this data to things like Memcached, Redis, and other non-relational stores.

TIP: Frank Wiles on Binary Data in Databases

Actually, Frank says that there are three things to never store in a database, the third item being binary data. Storage of binary data in databases is addressed by

`django.db.models.FileField`, which does the work of storing files on file servers like AWS CloudFront or S3 for you. Exceptions to this are detailed in [Section 6.4.5: When to Use BinaryField](#).

26.3.2 Getting the Most Out of PostgreSQL

If using **PostgreSQL**, be certain that it is set up correctly in production. As this is outside the scope of the book, we recommend the following articles:

- wiki.postgresql.org/wiki/Detailed_installation_guides
- wiki.postgresql.org/wiki/Tuning_Your_PostgreSQL_Server
- revsys.com/writings/postgresql-performance.html
- craigkerstiens.com/2012/10/01/understanding-postgres-performance
- craigkerstiens.com/2013/01/10/more-on-postgres-performance

26.3.3 Getting the Most Out of MySQL

It's easy to get **MySQL** running, but optimizing production installations requires experience and understanding. As this is outside the scope of this book, we recommend the following links to help you:

- TODO - list good resources

26.4 Cache Queries With Memcached or Redis

You can get a lot of mileage out of simply setting up Django's built-in caching system with Memcached or Redis. You will have to install one of these tools, install a package that provides Python bindings for them, and configure your project.

You can easily set up the per-site cache, or you can cache the output of individual views or template fragments. You can also use Django's low-level cache API to cache Python objects.

Reference material:

- docs.djangoproject.com/en/3.2/topics/cache/
- github.com/niwinz/django-redis

26.5 Identify Specific Places to Cache

Deciding where to cache is like being first in a long line of impatient customers at Ben and Jerry's on free scoop day. You are under pressure to make a quick decision without being able to see what any of the flavors actually look like.

Here are things to think about:

- ▶ Which views/templates contain the most queries?
- ▶ Which URLs are being requested the most?
- ▶ When should a cache for a page be invalidated?

Let's go over the tools that will help you with these scenarios.

26.6 Consider Third-Party Caching Packages

Third-party packages will give you additional features such as:

- ▶ Caching of QuerySets.
- ▶ Cache invalidation settings/mechanisms.
- ▶ Different caching backends.
- ▶ Alternative or experimental approaches to caching.

A few of the popular Django packages for caching are:

- ▶ **django-cacheops**
- ▶ **django-cachalot**

See djangopackages.org/grids/g/caching/ for more options.

WARNING: Third-Party Caching Libraries Aren't Always the Answer

Having tried many of the third-party Django cache libraries, we have to ask our readers to test them very carefully and be prepared to drop them. They are cheap, quick wins, but can lead to some hair-raising debugging efforts at the worst possible times.

Cache invalidation is hard, and in our experience, magical cache libraries are better for projects with more static content. By-hand caching is a lot more work, but leads to better performance in the long run and doesn't risk those terrifying moments.

26.7 Compression and Minification of HTML, CSS, and JavaScript

When a browser renders a web page, it usually has to load HTML, CSS, JavaScript, and image files. Each of these files consumes the user's bandwidth, slowing down page loads. One way to reduce bandwidth consumption is via compression and minification. Django even provides tools for you: `GZipMiddleware` and the `{% spaceless %}` template tag. Through the at-large Python community, we can even use `WSGI` middleware that performs the same task.

The problem with making Django and Python do the work is that compression and minification take up system resources, which can create bottlenecks of their own. A better approach is to use **Nginx** or **Apache** web servers configured to compress the outgoing content. If you are maintaining your own web servers, this is absolutely the way to go.

A common approach is to use a third-party compression module or Django library to compress and minify the HTML, CSS, and JavaScript in advance. Our preference is django-pipeline which comes recommended by Django core developer Jannis Leidel.

For CSS and JavaScript, most people use JavaScript-powered tools for minification. Tools like **django-webpack-loader** manage the JavaScript libraries within the Django context. The advantage of this approach is the greater mindshare of tools and solved problems in this domain space.

Tools and libraries to reference:

- Apache and Nginx compression modules
- **django-webpack-loader**
- **django-pipeline**
- **django-compressor**
- **django-htmlmin**
- Django's built-in spaceless tag: docs.djangoproject.com/en/3.2/ref/templates/builtins/spaceless
- djangopackages.org/grids/g/asset-managers/

26.8 Use Upstream Caching or a Content Delivery Network

Upstream caches such as **Varnish** are very useful. They run in front of your web server and speed up web page or content serving significantly. See varnish-cache.org.

Content Delivery Networks (CDNs) like Fastly, Akamai, and Amazon Cloudfront serve static media such as images, video, CSS, and JavaScript files. They usually have servers all over the world, which serve out your static content from the nearest location. Using a CDN rather than serving static content from your application servers can speed up your projects.

26.9 Other Resources

Advanced techniques on scaling, performance, tuning, and optimization are beyond the scope of this book, but here are some starting points.

On general best practices for web performance:

- TODO - add useful links

On scaling large Django sites:

- “*The Temple of Django Database Performance*” is a book that dives deep into optimizing Django projects for speed and scalability. It’s a delightful book full of fantasy and RPG references and worth every penny. spellbookpress.com/books/temple-of-django-database-performance/
- Written with a focus on scaling Django, the book “*High Performance Django*” espouses many good practices. Full tricks and tips, as well as questions in each section that force you to think about what you are doing. Dated in places, but still full of useful information. highperformancedjango.com
- Watch videos of presentations from past DjangoCons and PyCons about different developers’ experiences. Scaling practices vary from year to year and from company to company: https://www.youtube.com/results?search_query=django+scaling

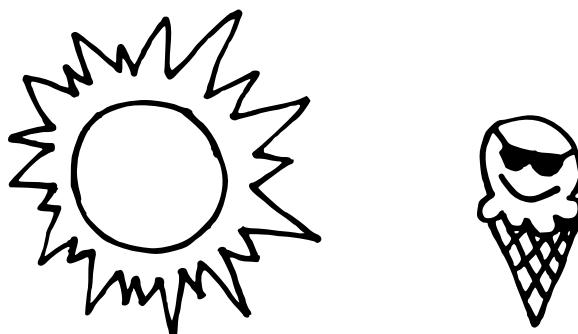


Figure 26.1: With your site running smoothly, you’ll be feeling as cool as a cone.

TIP: For Sites With High Volume: High Performance Django

We want to reiterate that “High Performance Django” is worth getting if your site has enough traffic to cause issues. While it’s getting old, Peter Baumgartner and Yann Malet wrote the book more at the conceptual level, making it a volume that you should consider purchasing.

- ▶ highperformancedjango.com
- ▶ amazon.com/High-Performance-Django/dp/1508748128

26.10 Summary

In this chapter, we explored a number of bottleneck reduction strategies including:

- ▶ Whether you should even care about bottlenecks in the first place.
- ▶ Profiling your pages and queries.
- ▶ Optimizing queries.
- ▶ Using your database wisely.
- ▶ Caching queries.
- ▶ Identifying what needs to be cached.
- ▶ Compression of HTML, CSS, and JavaScript.
- ▶ Exploring other resources.

In the next chapter, we’ll cover various practices involving **asynchronous task queues**, which may resolve our bottleneck problems.

27 | Asynchronous Task Queues

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

An **asynchronous task queue** is one where tasks are executed at a different time from when they are created, and possibly not in the same order they were created. Here is an example of a human-powered asynchronous task queue:

- ① In their spare time, Audrey and Daniel make ice cream cakes, taking orders from friends and family. They use an issue tracker to track their tasks for scooping, spreading, and decorating each cake.
- ② Every so often, when they have spare time, they review the list of tasks and pick one to do. Audrey prefers scooping and decorating, always doing those tasks first. Daniel prefers scooping and spreading, finishing those before decorating. The result is asynchronous completion of cake-making tasks.
- ③ As a cake-making task is completed and delivered, they mark the issue as closed.

TIP: Task Queue vs Asynchronous Task Queue

In the Django world, both terms are used to describe **asynchronous task queue**. When someone writes *task queue* in the context of Django, they usually mean *asynchronous task queue*.

Before we get into best practices, let's go over some definitions:

Broker The storage for the tasks themselves. This can be implemented using any sort of

persistence tool, although in Django the most common ones in use are **RabbitMQ** and **Redis**. In the human-powered example, the storage is an online issue tracker.

Producer The code that adds tasks to the queue to be executed later. This is application code, the stuff that makes up a Django project. In the human-powered example, this would be Audrey and Daniel, plus anyone they can get to pitch in to help.

Worker The code that takes tasks from the broker and performs them. Usually there is more than one worker. Most commonly each worker runs as a daemon under supervision. In the human-powered example, this is Audrey and Daniel.

Serverless Usually provided by services such as **AWS Lambda**, this is, to paraphrase Martin Fowler, “where some amount of server-side logic is written by us but unlike traditional architectures is run in stateless compute containers that are event-triggered, ephemeral (only last for one invocation), and fully managed by a 3rd party.” Serverless takes over the role of Broker and Worker. In the human-powered example, it’s as if Daniel and Audrey use a third-party service to take the orders and then follow their precise instructions on doing the work.

27.1 Do We Need a Task Queue?

It depends. They add complexity but can improve user experience. Arguably it comes down to whether a particular piece of code causes a bottleneck and can be delayed for later when more free CPU cycles are available.

Here is a useful rule of thumb for determining if a task queue should be used:

Results take time to process: Task queue *should* probably be used.

Users can and should see results immediately: Task queue *should not* be used.

Let’s go over some possible use cases:

| Issue | Use Task Queue? |
|--|-----------------|
| Sending bulk email | Yes |
| Modifying files (including images) | Yes |
| Fetching large amounts of data from third-party Ice Cream APIs | Yes |
| Inserting or updating a lot of records into a table | Yes |
| Updating a user profile | No |
| Adding a blog or CMS entry | No |
| Performing time-intensive calculations | Yes |
| Sending or receiving of webhooks | Yes |

Table 27.1: Should a Project Have a Task Queue?

Please keep in mind there are site-traffic driven exceptions to all of these use cases:

- Sites with small-to-medium amounts of traffic may never need a task queue for any of these actions.
- Sites with larger amounts of traffic may discover that nearly every user action requires use of a task queue.

Determining whether or not a site or action needs a task queue is a bit of an art. There is no easy answer we can provide. However, knowing how to use them is a really powerful tool in any developer's toolkit.

28 | Security Best Practices

When it comes to security, Django has a pretty good record. This is due to security tools provided by Django, solid documentation on the subject of security, and a thoughtful team of core developers who are extremely responsive to security issues. However, it's up to individual Django developers such as ourselves to understand how to properly secure Django-powered applications.

This chapter contains a list of things helpful for securing your Django application. This list is by no means complete. Consider it a starting point.

TIP: What to Do if You Have a Security Breach

If you're in the midst of a security crisis, please go to [Chapter 37: Appendix G: Handling Security Failures](#).

28.1 Reference Security Sections in Other Chapters

A number of other chapters in this book contain dedicated security sections, or touch on security matters. These are found at the following locations:

- [Section 5.3: Separate Configuration From Code](#)
- [Section 13.3: Always Use CSRF Protection With HTTP Forms That Modify Data](#)
- [???: ??](#)
- [Section 28.28: Never Display Sequential Primary Keys](#)
- [Section 21.8: Secure the Django Admin](#)
- [Chapter 37: Appendix G: Handling Security Failures](#)

28.2 Harden Your Servers

Search online for instructions and checklists for server hardening. Server hardening measures include but are not limited to things like setting up firewalls (help.ubuntu.com/community/UFW), changing your SSH port, and disabling/removing unnecessary services.

28.3 Know Django’s Security Features

Django’s security features include:

- ▶ Cross-site scripting (XSS) protection.
- ▶ Cross-site request forgery (CSRF) protection.
- ▶ SQL injection protection.
- ▶ Clickjacking protection.
- ▶ Support for TLS/HTTPS/HSTS, including secure cookies.
- ▶ Automatic HTML escaping.
- ▶ An expat parser hardened against XML bomb attacks.
- ▶ Hardened JSON, YAML, and XML serialization/deserialization tools.
- ▶ Secure password storage, using the PBKDF2 algorithm with a SHA256 hash by default. That said, please upgrade per [Section 28.29: Upgrade Password Hasher to Argon2](#)

Most of Django’s security features “just work” out of the box without additional configuration, but there are certain things that you’ll need to configure. We’ve highlighted some of these details in this chapter, but please make sure that you read the official Django documentation on security as well: docs.djangoproject.com/en/3.2/topics/security/

28.4 Turn Off DEBUG Mode in Production

Your production site should not be running in **DEBUG** mode. Attackers can find out more than they need to know about your production setup from a helpful **DEBUG** mode stack trace page. For more information, see docs.djangoproject.com/en/3.2/ref/settings/#debug.

Keep in mind that when you turn off DEBUG mode, you will need to set **ALLOWED_HOSTS** or risk raising a `SuspiciousOperation` error, which generates a 400 BAD REQUEST error that can be hard to debug. For more information on setting/debugging **ALLOWED_HOSTS** see:

- ▶ [Section 28.7: Use Allowed Hosts Validation](#)
- ▶ [Section 35.2.4: That Troublesome `settings.ALLOWED_HOSTS` Error](#)

28.5 Keep Your Secret Keys Secret

If the `SECRET_KEY` setting is not secret, depending on project setup, we risk an attacker gaining control of other people’s sessions, resetting passwords, and more. Our API keys and other secrets should be carefully guarded as well. These keys should not even be kept in version control.

We cover the mechanics of how to keep your `SECRET_KEY` out of version control

in [Chapter 5: Settings and Requirements Files](#), [Section 5.3: Separate Configuration From Code](#), and [Section 5.4: When You Can't Use Environment Variables](#).

28.6 HTTPS Everywhere

Sites must always be deployed behind HTTPS. Not having HTTPS means that malicious network users will sniff authentication credentials between your site and end users. In fact, all data sent between your site and end users is up for grabs.

There is also no guarantee that any of your users are seeing what you expect them to see: an attacker could manipulate anything in the request or the response. So HTTPS makes sense even if all your information is public, but you do care about the integrity of the information.

Your entire site must be behind HTTPS. Your site's static resources must also be served via HTTPS, otherwise visitors will get warnings about "insecure resources" which will rightly scare them away from your site. For reference, these warnings exist because they are a potential man-in-the-middle vector.

TIP: Jacob Kaplan-Moss on HTTPS vs HTTP

Django co-leader Jacob Kaplan-Moss says, "Your whole site should only be available via HTTPS, not HTTP at all. This prevents getting "firesheeped" (having a session cookie stolen when served over HTTP). The cost is usually minimal."

If visitors try to access your site via HTTP, they must be redirected to HTTPS. This can be done either through configuration of your web server or with Django middleware. Performance-wise, it's better to do this at the web server level, but if you don't have control over your web server settings for this, then redirecting via Django middleware is fine.

In the modern era obtaining SSL certificates is cheap and easy. Depending on your platform, it's even provided for free. To set it up, follow the instructions for your particular web server or platform-as-a-service. Our preferred services are the very reputable (and free) [letsencrypt.org](#) and [cloudflare.com](#). These services make it trivial to secure sites with proper SSL certificates.

Large cloud providers such as AWS, Google, and Microsoft also provide options.

WARNING: The Most Secure Option is to Set Up Your Own SSL

While services like CloudFlare, AWS, Google Cloud, and Azure make it easy to set up SSL, they aren't as secure as [letsencrypt.org](#). We can best explain this through the Principle of Least Privilege (POLP). This is the practice of limiting

access rights for users to the bare minimum permissions they need to perform their work.

While it is unlikely that a penetration will occur on these systems, either from an outside or employee, it is not outside the realm of possibility.

For many systems the time benefit of using someone else's SSL is worth it. However, sites containing critical privacy information (HIPAA comes to mind) should set up their own SSL.

WARNING: Not having HTTPS is Inexcusable

At the publication of this book it is 2020 and getting HTTPS/SSL into place is relatively easy. Furthermore, browsers give users bold unavoidable warnings about lack of SSL. Users of all ages and technical acumen are becoming knowledgeable of what these warnings mean. Search engines harshly penalize sites without it.

Going forward there is no excuse for having a production site not on HTTPS. Don't do it, even for demos or MVPs.

TIP: Use `django.middleware.security.SecurityMiddleware`

The tool of choice for projects on Django for enforcing HTTPS/SSL across an entire site through middleware is built right in. To activate this middleware just follow these steps:

- ① Add `django.middleware.security.SecurityMiddleware` to the `settings.MIDDLEWARE` definition.
- ② Set `settings.SECURE_SSL_REDIRECT` to `True`.

WARNING: `django.middleware.security.SecurityMiddleware` Does Not Include static/media

Even if all Django requests are served over HTTPS, omitting HTTPS for resources like javascript would still allow attackers to compromise your site.

As JavaScript, CSS, images, and other static assets are typically served directly by the web server (nginx, Apache), make certain that serving of such content is done via HTTPS. Providers of static assets such as Amazon S3 now do this by default.

28.6.1 Use Secure Cookies

Your site should inform the target browser to never send cookies unless via HTTPS. You'll need to set the following in your settings:

Example 28.1: Securing Cookies

```
SESSION_COOKIE_SECURE = True  
CSRF_COOKIE_SECURE = True
```

Read docs.djangoproject.com/en/3.2/topics/security/#ssl-https for more details.

28.6.2 Use HTTP Strict Transport Security (HSTS)

HSTS can be configured at the web server level. Follow the instructions for your web server, platform-as-a-service, and Django itself (via `settings.SECURE_HSTS_SECONDS`).

If you have set up your own web servers, Wikipedia has sample HSTS configuration snippets that you can use: en.wikipedia.org/wiki/HTTP_Strict_Transport_Security

When you enable HSTS, your site's web pages include a HTTP header that tells HSTS-compliant browsers to only connect to the site via secure connections:

- ▶ HSTS-compliant browsers will redirect HTTP links to HTTPS.
- ▶ If a secure connection isn't possible (e.g. the certificate is self-signed or expired), an error message will be shown and access will be disallowed.

To give you a better idea of how this works, here's an example of what a HTTP Strict Transport Security response header might look like:

Example 28.2: HSTS Response Header

```
Strict-Transport-Security: max-age=31536000; includeSubDomains
```

Some HSTS configuration advice:

- ➊ Set **max-age** to a small value like 300 (5 minutes) during initial deployment of a secured site to make sure you haven't screwed something up or forgotten to make some portion of the site available via HTTPS. We suggest this small value because once you set **max-age**, we can't unset it for users; their browsers control expiration, not us.

- ② Once it's been confirmed the site is properly secured, set **max-age** to incrementally larger values. Go to 1 hour (3600), 1 week (604800), 1 month (2592000), and finally 1 year (31536000). This allows us to correct issues that may not turn up in initial checks.
- ③ Once the project's **max-age** is set to 1 year or greater (31536000), submit the project for HSTS preloading, which can be done at hstspreload.org/. This aids in blocking active attackers from intercepting the first request from a user to a site.

WARNING: Choose Your HSTS Policy Duration Carefully

Remember that HSTS is a one-way switch. It's a declaration that for the next N seconds, your site will be HTTPS-only. Don't set a HSTS policy with a **max-age** longer than you are able to maintain. Browsers do not offer an easy way to unset it.

Note that HSTS should be enabled *in addition* to redirecting all pages to HTTPS as described earlier.

WARNING: Additional Warning for includeSubDomains

We recommend everyone to use HSTS with a long duration and to use **includeSubDomains**. However, especially in projects with lots of legacy components, the combination requires great care when configuring.

Example: Imagine we create a new Django website called *example.com*. The site is HTTPS with HSTS enabled. We test the HSTS settings, which work fine, and then increase the duration to a year. Alas, after a month, someone realises *legacy.example.com* is still a production service and does not support HTTPS. We remove **includeSubdomains** from the header, but by now it's already too late: all clients inside the company have the old HSTS header remembered.

In short, before even considering **includeSubdomains**, one should be entirely aware of what might be hosted under the domain that HSTS is configured on.

28.6.3 HTTPS Configuration Tools

Mozilla provides a SSL configuration generator at the mozilla.github.io/server-side-tls/ssl-config-generator/, which can provide a starting point for your own configuration. While not perfect, it expedites setting up HTTPS. As our security reviewers say, "In general, any HTTPS is better than plain HTTP."

Once you have a server set up (preferably a test server), use the Qualys SSL Labs server test at ssllabs.com/sslttest/index.html to see how well you did. A fun security game is trying to score an **A+**. Especially as the official Two Scoops of Django reward for getting that good of a grade is a trip to the local favorite ice cream saloon.

28.7 Use Allowed Hosts Validation

In production, you must set `ALLOWED_HOSTS` in your settings to a list of allowed host/domain names in order to avoid raising `SuspiciousOperation` exceptions. This is a security measure to prevent the use of fake HTTP host headers to submit requests.

We recommend that you avoid setting wildcard values here. For more information, read the Django documentation on `ALLOWED_HOSTS` and the `get_host()` method:

- ▶ docs.djangoproject.com/en/3.2/ref/settings/#allowed-hosts
- ▶ docs.djangoproject.com/en/3.2/ref/request-response/#django.http.HttpRequest.get_host

28.8 Always Use CSRF Protection With HTTP Forms That Modify Data

Django comes with easy-to-use cross-site request forgery protection (CSRF) built in, and by default it is activated across the site via the use of middleware. Make sure that your data changing forms use the POST method, which by default will activate CSRF protection on the server side. The only valid exception to use GET method is for search forms, where it is useful for the user to have the argument visible in the URL. We have some strong recommendations discussed in [Section 13.3: Always Use CSRF Protection With HTTP Forms That Modify Data](#).

28.9 Prevent Against Cross-Site Scripting (XSS) Attacks

XSS attacks usually occur when users enter malignant JavaScript that is then rendered into a template directly. This isn't the only method, but it is the most common. Fortunately for us, Django by default escapes `<`, `>`, `'`, `"`, and `&`, which is all that is needed for proper HTML escaping.

The following are recommended by the Django security team:

28.9.1 Use `format_html` Over `mark_safe`

Django gives developers the ability to mark content strings as safe, meaning that Django's own safeguards are taken away. A better alternative is `django.utils.html.format_html`, which is like Python's `str.format()` method, except designed for building up HTML

fragments. All args and kwargs are escaped before being passed to `str.format()` which then combines the elements.

Reference: docs.djangoproject.com/en/3.2/ref/utils/#django.utils.html.format_html

28.9.2 Don't Allow Users to Set Individual HTML Tag Attributes

If you allow users to set individual attributes of HTML tags, that gives them a venue for injecting malignant JavaScript.

28.9.3 Use JSON Encoding for Data Consumed by JavaScript

Rely on JSON encoding rather than finding ways to dump Python structures directly to templates. It's not just easier to integrate into client-side JavaScript, it's safer. To do this, always use the `json_script` filter.

Reference: docs.djangoproject.com/en/3.2/ref/templates/builtins/#json-script

28.9.4 Beware Unusual JavaScript

Due to JavaScript's weird semantics, it's possible to construct syntactically-valid, executable programs from a very tiny subset of characters. Per feld.to/unusual-javascript, it's possible to transform regular-looking JavaScript into an alphabet of only six characters (plus sign, exclamation mark, open/close bracket and open/close parenthesis).

WARNING: NSFW: feld.to/unusual-javascript not safe for work

The URL that feld.to/unusual-javascript links to has a URL that may violate educational or corporate viewing policies.

28.9.5 Add Content Security Policy Headers

Also known as CSP, Content Security Policy provides a standard method to declare approved origins of content that browsers should be allowed to load on a website. Covered types are JavaScript, CSS, HTML frames, web workers, fonts, images, embeddable objects such as Java applets, ActiveX, audio and video files, and other HTML5 features. Optionally, CSP can be used with a violation-report URL collected by a project or managed by a third-party service.

- en.wikipedia.org/wiki/Content_Security_Policy

- github.com/mozilla/django-csp

28.9.6 Additional Reading

There are other avenues of attack that can occur, so educating yourself is important.

- docs.djangoproject.com/en/3.2/ref/templates/builtins/#escape
- en.wikipedia.org/wiki/Cross-site_scripting

28.10 Defend Against Python Code Injection Attacks

We once were hired to help with a project that had some security issues. The requests coming into the site were being converted from `django.http.HttpRequest` objects directly into strings via creative use of the `str()` function, then saved to a database table. Periodically, these archived Django requests would be taken from the database and converted into Python dicts via the `eval()` function. This meant that arbitrary Python code could be run on the site at any time.

Needless to say, upon discovery the critical security flaw was quickly removed. This just goes to show that no matter how secure Python and Django might be, we always need to be aware that certain practices are incredibly dangerous.

28.10.1 Python Built-Ins That Execute Code

Beware of the `eval()`, `exec()`, and `execfile()` built-ins. If your project allows arbitrary strings or files to be passed into any of these functions, you are leaving your system open to attack.

For more information, read “Eval Really Is Dangerous” by Ned Batchelder:

nedbatchelder.com/blog/201206/eval_really_is_dangerous.html

28.10.2 Python Standard Library Modules That Can Execute Code

“Never unpickle data that could have come from an untrusted source, or that could have been tampered with.”

– docs.python.org/3/library/pickle.html

You should not use the Python standard library’s `pickle` module to deserialize anything which could have been modified by the user. As a general rule, avoid accepting pickled values from user for any reason. Specific warnings about `pickle` and security are listed below:

- lincolnloop.com/blog/playing-pickle-security/
- blog.nelhage.com/2011/03/exploiting-pickle/

28.10.3 Third-Party Libraries That Can Execute Code

When using PyYAML, only use `safe_load()`. While the use of YAML in the Python and Django communities is rare outside of continuous integration, it's not uncommon to receive this format from other services. Therefore, if you are accepting YAML documents, only load them with the `yaml.safe_load()` method.

For reference, the `yaml.load()` method will let you create Python objects, *which is really bad*. As Ned Batchelder says, `yaml.load()` should be renamed to `yaml.dangerous_load()`: nedbatchelder.com/blog/201302/war_is_peace.html

28.10.4 Be Careful With Cookie-Based Sessions

Typically most Django sites use either database- or cache-based sessions. These function by storing a hashed random value in a cookie which is used as a key to the real session value, which is stored in the database or cache. The advantage of this is that only the key to the session data is sent to the client, making it very challenging for malignant coders to penetrate Django's session mechanism.

However, Django sites can also be built using cookie-based sessions, which place the session data entirely on the client's machine. While this means slightly less storage needs for the server, it comes with security issues that justify caution. Specifically:

- ➊ It is possible for users to read the contents of cookie-based sessions.
- ➋ If an attacker gains access to a project's `SECRET_KEY` and your session serializer is JSON-based, they gain the ability to falsify session data and therefore, if authentication is used, impersonate any user.
- ➌ If an attacker gains access to a project's `SECRET_KEY` and your session serializer is pickle-based, they gain the ability to not only falsify session data, but also to execute arbitrary code. In other words, not only can they assume new rights and privileges, they can also upload working Python code. If you are using pickle-based sessions or are considering using them, please read the tip below.
- ➍ Another disadvantage of this configuration is that sessions can't be invalidated in a guaranteed way (except when they expire): you can try to override the cookie in the browser with a new value, but you can't enforce an attacker to use it: if they continue sending requests with the old cookie, the session backend won't know the difference.

TIP: Use JSON for Cookie-Based Sessions

The default cookie serializer for Django is JSON-based, meaning that even if an attacker discovers a project's `SECRET_KEY`, they can't execute arbitrary code. If you decide to write your own cookie serializer, stick to using JSON as the format. Never, ever use the optional `pickle` serializer.

Resources on the subject:

- docs.djangoproject.com/en/3.2/topics/http/sessions/#session-serialization
- docs.djangoproject.com/en/3.2/ref/settings/#session-serializer

Another thing to consider is that cookie-based sessions are a potential client-side performance bottleneck. Transmitting the session data server-to-client is generally not an issue, but client-to-server transmissions are much, much slower. This is literally the difference between download and upload speeds all internet users encounter.

In general, we try to avoid cookie-based sessions.

Additional reading:

- docs.djangoproject.com/en/3.2/topics/http/sessions/#using-cookie-based-sessions
- <http://bit.ly/2plfHqU> Threatpost.com article on cookies
- yuiblog.com/blog/2007/03/01/performance-research-part-3/

28.11 Validate All Incoming Data With Django Forms

Django forms should be used to validate all data being brought into your project, including from non-web sources. Doing so protects the integrity of our data and is part of securing your application. We cover this in [Section 13.1: Validate All Incoming Data With Django Forms](#).

TIP: Using DRF Serializers Instead of Django Forms

Django REST Framework's validation is as well constructed and secure as Django's form libraries. If you are more familiar with DRF, then using serializers to validate all incoming data is perfectly okay.

28.12 Disable the Autocomplete on Payment Fields

You should disable the HTML field autocomplete browser feature on fields that are gateways to payment. This includes credit card numbers, CVVs, PINs, credit card dates, etc. The reason is that a lot of people use public computers or their personal computers in public venues.

For reference, Django forms make this easy:

Example 28.3: Disabling Autocomplete in Form Fields

```
from django import forms

class SpecialForm(forms.Form):
    my_secret = forms.CharField(
        widget=forms.TextInput(attrs={'autocomplete': 'off'}))
```

For any site that might be used in a public area (an airport for example), consider changing the form field itself to PasswordInput:

Example 28.4: Changing Public Widget to PasswordInput

```
from django import forms

class SecretInPublicForm(forms.Form):

    my_secret = forms.CharField(widget=forms.PasswordInput())
```

28.13 Handle User-Uploaded Files Carefully

The only way to completely safely serve user-provided content is from a completely separate domain. For better or worse, there are an infinite number of ways to bypass file type validators. This is why security experts recommend the use of **content delivery networks** (CDNs): they serve as a place to store potentially dangerous files.

If you must allow upload and download of arbitrary file types, make sure that the server uses the “Content-Disposition: attachment” header so that browsers won’t display the content inline.

28.13.1 When a CDN Is Not an Option

When this occurs, uploaded files must be saved to a directory that does not allow them to be executed. In addition, at the very least make sure the HTTP server is configured to serve

images with image content type headers, and that uploads are restricted to a whitelisted subset of file extensions.

Take extra care with your web server's configuration here, because a malicious user can try to attack your site by uploading an executable file like a CGI or PHP script and then accessing the URL. This won't solve every problem, but it's better than the defaults.

Consult your web server's documentation for instructions on how to configure this, or consult the documentation for your platform-as-a-service for details about how static assets and user-uploaded files should be stored.

28.13.2 Django and User-Uploaded Files

Django has two model fields that allow for user uploads: `FileField` and `ImageField`. They come with some built-in validation, but the Django docs also strongly advise you to "pay close attention to where you're uploading them and what type of files they are, to avoid security holes."

If you are only accepting uploads of certain file types, do whatever you can do to ensure that the user is only uploading files of those types. For example, you can:

- ▶ Use the **python-magic** library to check the uploaded file's headers:
github.com/ahupp/python-magic
- ▶ Validate the file with a Python library that specifically works with that file type. Unfortunately this isn't documented, but if you dig through Django's `ImageField` source code, you can see how Django uses PIL to validate that uploaded image files are in fact images.
- ▶ Use **defusedxml** instead of native Python XML libraries or lxml. See [Section 28.21: Guard Against XML Bombing With defusedxml](#).

WARNING: Custom Validators Aren't the Answer Here

Don't just write a custom validator and expect it to validate your uploaded files before dangerous things happen. Custom validators are run against field content after they've already been coerced to Python by the field's `to_python()` method.

If the contents of an uploaded file are malicious, any validation happening after `to_python()` is executed may be too late.

Further research:

- ▶ docs.djangoproject.com/en/3.2/ref/models/fields/#filefield

- youtube.com/watch?v=HS8KQbswZkU Tom Eastman's PyCon AU talk on the “The dangerous, exquisite art of safely handing user-uploaded files” is required watching if building a site handling file uploads.

28.14 Don't Use ModelForms.Meta.exclude

When using ModelForms, always use `Meta.fields`. Never use `Meta.exclude`. The use of `Meta.exclude` is considered a grave security risk, specifically a **Mass Assignment Vulnerability**. *We can't stress this strongly enough. Don't do it.*

One common reason we want to avoid the `Meta.exclude` attribute is that its behavior implicitly allows all model fields to be changed except for those that we specify. When using the `excludes` attribute, if the model changes after the form is written, we have to remember to change the form. If we forget to change the form to match the model changes, we risk catastrophe.

Let's use an example to show how this mistake could be made. We'll start with a simple ice cream store model:

Example 28.5: Sample Store Model

```
# stores/models.py
from django.conf import settings
from django.db import models

class Store(models.Model):
    title = models.CharField(max_length=255)
    slug = models.SlugField()
    owner = models.ForeignKey(settings.AUTH_USER_MODEL)
    # Assume 10 more fields that cover address and contact info.
```

Here is the *wrong way* to define the `ModelForm` fields for this model:

Example 28.6: Implicit Definition of Form Fields

```
# DON'T DO THIS!
from django import forms

from .models import Store

class StoreForm(forms.ModelForm):

    class Meta:
```

```

model = Store
# DON'T DO THIS: Implicit definition of fields.
#                               Too easy to make mistakes!
excludes = ("pk", "slug", "modified", "created", "owner")

```

In contrast, this is the *right way* to define the same ModelForm's fields:

Example 28.7: Explicit Definition of Form Fields

```

from django import forms

from .models import Store

class StoreForm(forms.ModelForm):

    class Meta:
        model = Store
        # Explicitly specifying the fields we want
        fields = (
            "title", "address_1", "address_2", "email",
            "usstate", "postal_code", "city",
        )

```

The first code example, as it involves less typing, appears to be the better choice. It's not, as when you add a new model field you now need to track the field in multiple locations (one model and one or more forms).

Let's demonstrate this in action. Perhaps after launch we decide we need to have a way of tracking store co-owners, who have all the same rights as the owner. They can access account information, change passwords, place orders, and specify banking information. The store model receives a new field as shown on the next page:

Example 28.8: Added Co-Owners Field

```

# stores/models.py
from django.conf import settings
from django.db import models

class Store(models.Model):
    title = models.CharField(max_length=255)

```

```
slug = models.SlugField()
owner = models.ForeignKey(settings.AUTH_USER_MODEL)
co_owners = models.ManyToManyField(settings.AUTH_USER_MODEL)
# Assume 10 more fields that cover address and contact info.
```

The first form code example which we warned against using relies on us remembering to alter it to include the new `co_owners` field. If we forget, then anyone accessing that store's HTML form can add or remove co-owners. While we might remember a single form, what if we have more than one `ModelForm` for a model? In complex applications this is not uncommon.

On the other hand, in the second example, where we used `Meta.fields` we know exactly what fields each form is designed to handle. Changing the model doesn't alter what the form exposes, and we can sleep soundly knowing that our ice cream store data is more secure.

28.14.1 Mass Assignment Vulnerabilities

The problem we describe in this section is a **Mass Assignment Vulnerability**.

These occur when the patterns such as Active Record, designed to empower developers, create security risks for web applications. The solution is the approach we advocate in this section, which is explicit definition of fields that can be modified.

See [n.wikipedia.org/wiki/Mass_assignment_vulnerability](https://en.wikipedia.org/wiki/Mass_assignment_vulnerability) for more detail.

28.15 Don't Use `ModelForms.Meta.fields = "all"`

This includes every model field in your model form. It's a shortcut, and a dangerous one. It's very similar to what we describe in [Section 28.14: Don't Use `ModelForms.Meta.exclude`](#), and even with custom validation code, exposes projects to form-based Mass Assignment Vulnerabilities. We advocate avoiding this technique as much as possible, as we feel that it's simply impossible to catch all variations of input.

28.16 Beware of SQL Injection Attacks

The Django ORM generates properly-escaped SQL which will protect your site from users attempting to execute malignant, arbitrary SQL code.

Django allows you to bypass its ORM and access the database more directly through raw SQL. When using this feature, be especially careful to escape your SQL code properly. This is of concern in these specific components of Django:

- The `.raw()` ORM method.

- The `.extra()` ORM method.
- Directly accessing the database cursor.

Reference:

- docs.djangoproject.com/en/3.2/topics/security/#sql-injection-protection

28.17 Don't Store Unnecessary Data

There is data we should avoid storing for financial and legal reasons.

28.17.1 Never Store Credit Card Data

Unless you have a strong understanding of the PCI-DSS security standards (pcisecuritystandards.org) and adequate time/resources/funds to validate your PCI compliance, storing credit card data is too much of a liability and should be avoided.

Instead, we recommend using third-party services like Stripe, Braintree, Adyen, PayPal, and others that handle storing this information for you, and allow you to reference the data via special tokens. Most of these services have great tutorials, are very Python and Django friendly, and are well worth the time and effort to incorporate into your project.

TIP: Educate Yourself on PCI Compliance

Ken Cochrane has written an excellent blog post on PCI compliance. Please read kencochrane.net/blog/2012/01/developers-guide-to-pci-compliant-web-applications/

TIP: Read the Source Code of Open Source E-Commerce Solutions

If you are planning to use any of the existing open source Django e-commerce solutions, examine how the solution handles payments. If credit card data is being stored in the database, even encrypted, then please use another solution.

28.17.2 Don't Store PII or PHI Unless Required (By Law)

PII is the abbreviation for **Personally Identifying Information** and **PHI** is the abbreviation for **Protected Health Information**. This data is a key part of our online identity and can be exploited to gain access to various accounts or worse. Using the United States as an example, storing Social Security Numbers (SSN) and state ID numbers should be avoided

unless required by law. Even if required by law, if it is possible to store the data in one-way hashes, then by all means do so.

If PII is discovered within a project that doesn't have a legal obligation to store it, raise it as an issue immediately with the project owners. Having this data stolen through either technical or social methods can be disastrous legally and financially for an organization. In the case of Payment cards can be easily cancelled, the same cannot be said for PII.

In the case of PHI, which is medical data, our warnings are more dire. Specifically, *everyone involved is at risk for civil and criminal prosecution under Title II of HIPAA*. See en.wikipedia.org/wiki/HIPAA#Security_Rule. While that rule is for US-based projects, many countries have similar regulations. For example, the authors know someone called to trial in Kenya over a PHI leak.

28.18 Monitor Your Sites

Check your web servers' access and error logs regularly. Install monitoring tools and check on them frequently. Keep an eye out for suspicious activity.

28.19 Keep Your Dependencies Up-to-Date

You should always update your projects to work with the latest stable release of Django and third-party dependencies. This is particularly important when a release includes security fixes. For that, we recommend pyup.io, which automatically checks requirements files against the latest versions that PyPI provides.

'I've set up (these kinds of services) for distinct actions: it mails me once a week for each project with any outdated dependencies, and if it finds an insecure version it automatically creates a pull request in GitHub, so tests run automatically and I can deploy quickly.'

– Sasha Romijn, Django core dev and security reviewer for Two Scoops of Django 1.8

Useful links for updates to Django itself.

- ▶ The official Django weblog at [djangoproject.com/weblog/](https://.djangoproject.com/weblog/)
- ▶ The official django-announce mailing list at [groups.google.com/forum/#!forum/django-announce](https://groups.google.com/forum/#forum/django-announce)

28.20 Prevent Clickjacking

Clickjacking is when a malicious site tricks users to click on a concealed element of another site that they have loaded in a hidden frame or iframe. An example is a site with a false social media 'login' button that is really a purchase button on another site.

Django has instructions and components to prevent this from happening:

- docs.djangoproject.com/en/3.2/ref/clickjacking/

28.21 Guard Against XML Bombing With defusedxml

Attacks against XML libraries are nothing new. For example, the amusingly titled but devastating ‘Billion Laughs’ attack (<http://en.wikipedia.org/wiki/BillionLaughs>) was discovered in 2003.

Unfortunately, Python, like many other programming languages, doesn’t account for this or other venues of attack via XML. Furthermore, third-party Python libraries such as *lxml* are vulnerable to at least 4 well-known XML-based attacks. For a list of Python and Python library vulnerabilities see pypi.org/project/defusedxml/#python-xml-libraries.

Fortunately for us, Christian Heimes created **defusedxml**, a Python library designed to patch Python’s core XML libraries and some of the third-party libraries (including *lxml*).

For more information, please read:

- pypi.org/project/defusedxml

28.22 Explore Two-Factor Authentication

Two-factor authentication (2FA) requires users to authenticate by combining two separate means of identification.

For modern web applications, what that usually means is you enter your password as well as a value sent to your mobile device. Another option for One-Time Passwords (OTP) is to register them in a password manager.

The advantage of 2FA is that it adds another component, one that changes frequently, to the authentication process, great for any site involving personal identity, finance, or medical requirements.

The downside is that the user needs to have a charged mobile device with access to a network in order to log in to your site, making it not so ideal for users who may not have a charged mobile device or easy access to a network.

- en.wikipedia.org/wiki/Two_factor_authentication
- <https://pypi.org/project/django-two-factor-auth>

PACKAGE TIP: Look for TOTP in 2FA Products and Packages

TOTP is short for en.wikipedia.org/wiki/Time-based_One-time_Password_Algorithm, which is an open standard used by Google Authenticator and many other services. TOTP does not require network access, which is useful for building certain kinds of Django projects. However, SMS implementations require cellular network access or third-party services such as twilio.com.

WARNING: The Issue of 2FA Recovery

An important issue is how people recover from loss of their 2FA token or phone number. Passwords are generally recovered by sending an e-mail with a secret link. However, if the 2FA token can also be reset by e-mail, access to the user's e-mail has basically become the single factor of authentication. Common methods include offering TOTP authentication with SMS as a fallback, or offering a number of recovery codes that need to be kept by the user. In some cases, organisations will only reset these tokens after receiving a scan of an identity card belonging to the account holder. In any case, a recovery process will be needed, so think of this in advance.

28.23 Embrace SecurityMiddleware

We've mentioned Django's built-in `django.middleware.security.SecurityMiddleware` several times already in this chapter. We owe it to ourselves and our users to embrace and use this feature of Django.

28.24 Force the Use of Strong Passwords

A strong password is one that more than just a list of characters. It is long and preferably complex, including punctuation, digits, and both character cases. Let's pledge to protect our users by enforcing the use of such passwords.

So what makes the best password?

Our opinion is that at this point in time, length is more important than complexity. An 8 character length password mixing cases, numbers, and special characters is easier by several orders of magnitude to break than a 50-character sentence of just lower cased letters. What's even better is if you have a 30-50 character sentence that includes numbers, mixed cases, and special characters.

Reference: xkcd.com/936/

| | |
|----------------|--|
| Quality
Bad | Password Specification
6-10 characters of just the alphabet |
| Okay | Minimum 8 characters, mixed case + numeric + special characters |
| Better | Minimum 30 characters of just the alphabet |
| Best | Minimum 30 characters, mixed case + numeric + special characters |

Table 28.1: Password Strength: Length vs Complexity

28.25 Don't Prevent Copy/Pasting of Password

There are sites that force users to enter passwords manually, rather than allow for copy/pasting. This is a terrible anti-pattern, one that encourages users to rely on easy-to-remember or repeatedly used passwords rather than strong, unique passwords for every site generated by **secure password managers** such as 1Password or LastPass.

28.26 Give Your Site a Security Checkup

There are a number of services that provide automated checkups for sites. They aren't security audits, but they are great, free ways to make certain that your production deployment doesn't have any gaping security holes.

[pyup.io](#)'s Safety library (github.com/pyupio/safety) checks your installed dependencies for known security vulnerabilities. By default it uses the open Python vulnerability database **Safety DB**, but can be upgraded to use [pyup.io](#)'s Safety API using the `--key` option.

TODO - consider adding snikt or other commercial tools

Mozilla also provides a similar, but non-Django specific service called Observatory (observatory.mozilla.org).

28.27 Put Up a Vulnerability Reporting Page

It's a good idea to publish information on your site about how users can report security vulnerabilities to you.

GitHub's "Responsible Disclosure of Security Vulnerabilities" page is a good example of this and rewards reporters of issues by publishing their names:

help.github.com/articles/responsible-disclosure-of-security-vulnerabilities/

28.28 Never Display Sequential Primary Keys

Displaying sequential primary keys is to be avoided because:

- They inform potential rivals or hackers of your volume
- By displaying these values we make it trivial to exploit insecure direct object references
- We also provide targets for XSS attacks

Here are some patterns for looking up records without revealing sequential identifiers:

28.28.1 Lookup by Slug

In the Django world, this is incredibly common. There are literally hundreds of examples available on how to do it. This is the goto method for many Django projects. However, it becomes a little challenging when you have issues with duplicate slugs. In which case, one of the other methods apply.

28.28.2 UUIDs

Django comes with very useful `models.UUIDField`. While a use case for using them as primary keys for large distributed systems exists, they also serve nicely for public lookups. Here is a sample model:

Example 28.9: Using UUID for Public Lookups

```
import uuid
from django.db import models

class IceCreamPayment(models.Model):
    uuid = models.UUIDField(
        unique=True,
        default=uuid.uuid4,
        editable=False)

    def __str__(self):
        return str(self.pk)
```

And here is how we call that model:

Example 28.10: Looking Up Payment By UUID

```
>>> from payments import IceCreamPayment
>>> payment = IceCreamPayment()
>>> IceCreamPayment.objects.get(id=payment.id)
<IceCreamPayment: 1>
>>> payment.uuid
```

```

UUID('0b0fb68e-5b06-44af-845a-01b6df5e0967')
>>> IceCreamPayment.objects.get(uuid=payment.uuid)
<IceCreamPayment: 1>

```

TIP: Using UUIDs as the Primary Key

Some people like to use UUIDs as the primary key. In fact, we've done so on several projects over the years. Here are observations on doing so by us and members of the Django security team:

UUIDs as primary keys simplifies the security of data. Instead of two fields (id and uuid), there is just "id".

On the other hand, sequential IDs are possible for humans to remember, UUIDs are not. If the only access to a model is through UUIDs, that makes working with data a bit harder. To grab a particular record one typically needs the entire UUID string.

Also, there are performance considerations to be aware of when using UUIDs for lookups. Security is being traded for speed: percona.com/blog/2019/11/22/uuids-are-popular-but-bad-for-performance-lets-discuss/.

What all of this tells us is that UUIDs for primary keys (and lookups) is something that should be considered carefully. If a project is expected to handle billions of records, an alternative approach (including sequential IDs) should be considered.

WARNING: The Dangers of Obfuscating Sequential IDs

Slugs and UUIDs both have their disadvantages. The slug-based approach runs into collisions quickly, causing things like, "vanilla", "vanilla-2", "vanilla-3" to occur. UUIDs, to put it simply, are long and not memorizable by most humans. What can we do?

You can obfuscate the sequential ID. But we don't recommend it. Why not?

The short answer: Obfuscating is not an effective way to hide sequential IDs.

The long answer: There are any number of methods for obfuscating numbers ranging from base64 encoding to using the [hashids](#) library. These approaches work by converting a number to a alphanumeric code and back again. They not only hide the number, they also shorten it. Sounds great, right?

The problem is that every method of obfuscating sequential IDs is fundamentally insecure. Base64 encoding is trivial to undo. Libraries like [hashids](#) can be broken with [brute-force attacks](#) or by anyone with a good understanding of cryptographic knowledge (carnage.github.io/2015/08/

cryptanalysis-of-hashids).

To summarize: If you want to hide your sequential identifiers, don't rely on obfuscation.

28.29 Upgrade Password Hasher to Argon2

...Django's default password hasher is PBKDF2. While this is still acceptable as a lowest-common-denominator option, there are and for many years have been better options available.

—James Bennett, Django Core Developer and security reviewer of Two Scoops of Django.

PBKDF2 is Django's default because it's supported in the Python standard library and thus requires no third-party packages. **Argon2** is the best option that is natively supported by Django. Installation instructions and references:

- <https://docs.djangoproject.com/en/3.2/topics/auth/passwords/#using-argon2-with-django> - Instructions on installing and using Argon2 with Django
- <https://docs.djangoproject.com/en/3.2/topics/auth/passwords/#argon2> - Instructions on customizing Argon2 arguments (advanced and not necessary for most projects)
- latacora.micro.blog/2018/04/03/cryptographic-right-answers.html - Easy-to-understand list of answers to questions non-security focused developers get asked about cryptographic questions.

28.30 Use SRI When Loading Static Assets From External Sources

It is not uncommon for projects to load libraries from external sources. For example, JQuery, Google Fonts, Bootstrap Tailwindcss, and even React and Vue are often loaded from CDNs like **CDNJS**, unpkg, Google Hosted Libraries, and others. Unfortunately, without the use of SRI (Subresource Integrity) to confirm the source, attackers can replace or modify assets used by users. In other words, don't do this:

Example 28.11: Naively Loading Bootstrap Assets

```
<!-- DON'T DO THIS -- loading static assets without SRI -->
<link rel="stylesheet"
```

```

    href="https://stackpath.bootstrapcdn.com/bootstrap/4.3.1/css/bootstrap.min.css" integrity="sha384-ggOyR0iXCbMQv3Xipma34MD+dH/1fQ784/j6cY/iJTQUOhcWr7x9JvoRxT2MZw1T" crossorigin="anonymous">
```

```

<script
  src="https://code.jquery.com/jquery-3.3.1.slim.min.js"></script>
<script
  src="https://cdnjs.cloudflare.com/ajax/libs/popper.js/1.14.7/umd/popper.min.js" integrity="sha384-UOVoax9+DjC5qZiX4cWzB8KkVdG8PpUJYqMfDyXNQaEhDfobVJhZlL5IyJq3" crossorigin="anonymous"></script>
<script
  src="https://stackpath.bootstrapcdn.com/bootstrap/4.3.1/js/bootstrap.min.js" integrity="sha384-JZR6Spejh4U024dShasOcaD8cYQrRiQ/cS8e3XVSDJq4Hw+R9L1zC5QgNc1dL" crossorigin="anonymous"></script>
```

This is why we recommend the use of subresource integrity hashes when including CSS, JavaScript, or web fonts from external projects. This is provided as a feature by **CDNJS**, the **JQuery project**, the **Bootstrap** project, and a shockingly small number of other projects.

From the official Bootstrap site, this is what using SRI looks like:

Example 28.12: Using SRI When Loading Bootstrap Assets

```

<!-- Loading Static Assets with SRI -->
<link rel="stylesheet"
      href="https://stackpath.bootstrapcdn.com/bootstrap/4.3.1/css/bootstrap.min.css"
      integrity="sha384-ggOyR0iXCbMQv3Xipma34MD+dH/1fQ784/j6cY/iJTQUOhcWr7x9JvoRxT2MZw1T" crossorigin="anonymous">

<script src="https://code.jquery.com/jquery-3.3.1.slim.min.js"
       integrity="sha384-q8i/X+965Dz00rT7abK41JStQIAqVgRVzbzo5smXKp4YfRvH+8abtTE1Pi6jizo" crossorigin="anonymous"></script>

<script src="https://cdnjs.cloudflare.com/ajax/libs/popper.js/1.14.7/umd/popper.min.js"
       integrity="sha384-UOVoax9+DjC5qZiX4cWzB8KkVdG8PpUJYqMfDyXNQaEhDfobVJhZlL5IyJq3" crossorigin="anonymous"></script>

<script src="https://stackpath.bootstrapcdn.com/bootstrap/4.3.1/js/bootstrap.min.js"
       integrity="sha384-JZR6Spejh4U024dShasOcaD8cYQrRiQ/cS8e3XVSDJq4Hw+R9L1zC5QgNc1dL" crossorigin="anonymous"></script>
```

If a project doesn't include SRI hashes with their installation instructions, we suggest you

load their assets using CDNJS, which includes it as a feature in their “copy” dropdown. Just choose the “copy link tag” option.

Recommended tools and useful references:

- cdnjs.com - CDN that provides SRI hashes for all libraries they host
- developer.mozilla.org/en-US/docs/Web/Security/Subresource_Integrity - Mozilla’s documentation of SRI
- w3.org/TR/SRI/ - Official specification

28.31 Reference Our Security Settings Appendix

Keeping track of everything that relates to security and Django is challenging. This chapter alone is nigh 30 pages long and at the beginning we make it very clear this is not an absolute reference.

In order to add clarity, we’ve created [Appendix G: Security Settings Reference](#). This is where we put important and useful information on how to better configure the security settings of a Django project.

28.32 Review the List of Security Packages

In the [security section](#) of Appendix A: Packages, we list over ten related security packages that can make a difference to your site. While some are listed in this chapter, others are unique to that section of this book.

28.33 Keep Up-to-Date on General Security Practices

We end this chapter with some common-sense advice.

First, keep in mind that security practices are constantly evolving, both in the Django community and beyond. Subscribe to groups.google.com/forum/#!forum/django-announce and check Twitter, Hacker News, and various security blogs regularly.

Second, remember that security best practices extend well beyond those practices specific to Django. You should research the security issues of every part of your web application stack, and you should follow the corresponding sources to stay up to date.

TIP: Good Books and Articles on Security

Paul McMillan, Django core developer, security expert, and Two Scoops reviewer, recommends the following books:

- “*The Tangled Web: A Guide to Securing Modern Web Applications*”:
amzn.to/1hXAAyx
- “*The Web Application Hacker’s Handbook*”:

amzn.to/1dZ7xEY

In addition, we recommend the following reference site:

- wiki.mozilla.org/WebAppSec/Secure_Coding_Guidelines

28.34 Summary

Please use this chapter as a starting point for Django security, not the ultimate reference guide. See the Django documentation's list for additional security topics:

docs.djangoproject.com/en/3.2/topics/security/#additional-security-topics

Django comes with a good security record due to the diligence of its community and attention to detail. Security is one of those areas where it's a particularly good idea to ask for help. If you find yourself confused about anything, ask questions and turn to others in the Django community for help.

29 | Logging: What's It For, Anyway?

Logging is like rocky road ice cream. Either you can't live without it, or you forget about it and wonder once in awhile why it exists.

Anyone who's ever worked on a large production project with intense demands understands the importance of using the different log levels appropriately, creating module-specific loggers, meticulously logging information about important events, and including extra detail about the application's state when those events are logged.

While logging might not seem glamorous, remember that it is one of the secrets to building extremely stable, robust web applications that scale and handle unusual loads gracefully. Logging can be used not only to debug application errors, but also to track interesting performance metrics.

Logging unusual activity and checking logs regularly is also important for ensuring the security of your server. In the previous chapter, we covered the importance of checking your server access and error logs regularly. Keep in mind that application logs can be used in similar ways, whether to track failed login attempts or unusual application-level activity.

29.1 Application Logs vs. Other Logs

This chapter focuses on application logs. Any log file containing data logged from your Python web application is considered an application log.

In addition to your application logs, you should be aware that there are other types of logs, and that using and checking all of your server logs is necessary. Your server logs, database logs, network logs, etc. all provide vital insight into your production system, so consider them all equally important.

29.2 Why Bother With Logging?

Logging is your go-to tool in situations where a stack trace and existing debugging tools aren't enough. Whenever you have different moving parts interacting with each other or the possibility of unpredictable situations, logging gives you insight into what's going on.

The different log levels available to you are DEBUG, INFO, WARNING, ERROR, and CRITICAL. Let's now explore when it's appropriate to use each logging level.

29.3 When to Use Each Log Level

In places other than your production environment, you might as well use all the log levels. Log levels are controlled in your project's settings modules, so we can fine tune this recommendation as needed to account for load testing and large scale user tests.

In your production environment, we recommend using every log level except for DEBUG.

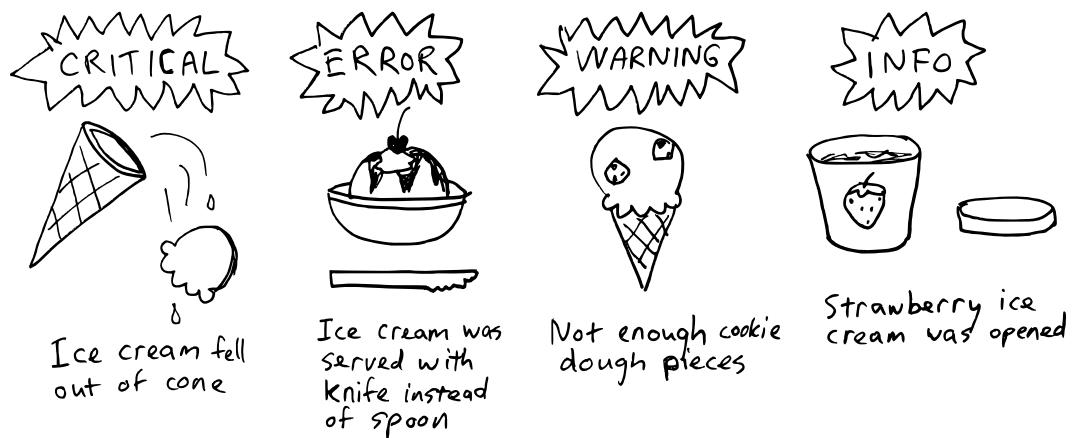


Figure 29.1: Appropriate usage of CRITICAL/ERROR/WARNING/INFO logging in ice cream.

Since the same CRITICAL, ERROR, WARNING, and INFO logs are captured whether in production or development, introspection of buggy code requires less modification of code. This is important to remember, as debug code added by developers working to fix one problem can create new ones.

The rest of this section covers how each log level is used.

29.3.1 Log Catastrophes With CRITICAL

Use the CRITICAL log level only when something catastrophic occurs that requires urgent attention.

For example, if your code relies on an internal web service being available, and if that web service is part of your site's core functionality, then you might log at the CRITICAL level anytime that the web service is inaccessible.

This log level is never used in core Django code, but you should certainly use it in your code anywhere that an extremely serious problem can occur.

29.3.2 Log Production Errors With ERROR

Let's look at core Django for an example of when `ERROR` level logging is appropriate. In core Django, the `ERROR` log level is used very sparingly. There is one very important place where it is used: whenever code raises an exception that is not caught, the event gets logged by Django using the following code:

Example 29.1: Logging Production Errors

```
# Taken directly from core Django code.
# Used here to illustrate an example only, so don't
# copy this into your project.
logger.error('Internal Server Error: %s', request.path,
             exc_info=exc_info,
             extra={
                 'status_code': 500,
                 'request': request
             }
)
```

How does Django put this to good use? Well, when `DEBUG=False` is in your settings, everyone listed in `ADMINS` immediately gets emailed the following:

- ▶ A description of the error
- ▶ A complete Python traceback from where the error occurred
- ▶ Information about the HTTP request that caused the error

If you've ever received one of those email notifications, you know how useful `ERROR` logs are when you need them most.

Similarly, we recommend that you use the `ERROR` log level whenever you need to log an error that is worthy of being emailed to you or your site admins. When your code catches the exception, log as much information as you can to be able to resolve the problem.

For example, an exception may be thrown when one of your views cannot access a needed third-party API. When the exception is caught, you can log a helpful message and the API's failure response, if any.

29.3.3 Log Lower-Priority Problems With WARNING

This level is good for logging events that are unusual and potentially bad, but not as bad as `ERROR`-level events.

For example, if you are using `django-admin-honeypot` to set up a fake `admin/` login form, you might want to log intruders' login attempts to this level.

Django uses the log level in several parts of `CsrfViewMiddleware`, to log events that result in a `403 Forbidden` error. For example, when an incoming POST request is missing its `csrf_token`, the event gets logged as follows:

Example 29.2: Logging Missing CSRF

```
# Taken directly from core Django code.  
# Used here to illustrate an example only, so don't  
# copy this into your project.  
logger.warning('Forbidden (%s): %s',  
    REASON_NO_CSRF_COOKIE, request.path,  
    extra={  
        'status_code': 403,  
        'request': request,  
    }  
)
```

29.3.4 Log Useful State Information With INFO

We recommend using this level to log any details that may be particularly important when analysis is needed. These include:

- Startup and shutdown of important components not logged elsewhere
- State changes that occur in response to important events
- Changes to permissions, e.g. when users are granted admin access

In addition to this, the `INFO` level is great for logging any general information that may help in performance analysis. It's a good level to use while hunting down problematic bottlenecks in your application and doing profiling.

29.3.5 Log Debug-Related Messages to DEBUG

In development, we recommend using `DEBUG` and occasionally `INFO` level logging wherever you'd consider throwing a `print` statement into your code for debugging purposes.

Getting used to logging this way isn't hard. Instead of this:

Example 29.3: Using Print to Display Data

```
from django.views.generic import TemplateView

from .helpers import pint_counter

class PintView(TemplateView):

    def get_context_data(self, *args, **kwargs):
        context = super().get_context_data(**kwargs)
        pints_remaining = pint_counter()
        print(f'Only {pints_remaining} pints of ice cream left.')
        return context
```

We do this:

Example 29.4: Using Logging to Display Data

```
import logging

from django.views.generic import TemplateView

from .helpers import pint_counter

logger = logging.getLogger(__name__)

class PintView(TemplateView):

    def get_context_data(self, *args, **kwargs):
        context = super().get_context_data(**kwargs)
        pints_remaining = pint_counter()
        logger.debug('Only %d pints of ice cream left.' %
                     pints_remaining)
        return context
```

TIP: Don't use f-strings in logging statements

As of Python 3.9, f-strings don't work with loggers.

Sprinkling `print` statements across your projects results in problems and technical debt:

- Depending on the web server, a forgotten print statement can bring your site down.
- *Print statements are not recorded.* If you don't see them, then you miss what they were trying to say.

Unlike print statements, logging allows different report levels and different response methods. This means that:

- We can write DEBUG level statements, leave them in our code, and never have to worry about them doing anything when we move code to production.
- The response method can provide the response as email, log files, console and `stdout`. It can even report as pushed HTTP requests to applications such as *Sentry*!

Note that there's no need to go overboard with debug-level logging. It's great to add `logging.debug()` statements while you're debugging, but there's no need to clutter your code with logging every single line.



Figure 29.2: Appropriate usage of DEBUG logging in ice cream.

29.4 Log Tracebacks When Catching Exceptions

Whenever you log an exception, it's usually helpful to log the stack trace of the exception. Python's logging module supports this:

- ❶ `Logger.exception()` automatically includes the traceback and logs at ERROR level.
- ❷ For other log levels, use the optional `exc_info` keyword argument.

Here's an example of adding a traceback to a WARNING level log message:

Example 29.5: Capturing Tracebacks with exc_info

```

import logging
import requests

logger = logging.getLogger(__name__)

def get_additional_data():
    try:
        r = requests.get('http://example.com/something-optional/')
    except requests.HTTPError as e:
        logger.exception(e)
        logger.debug('Could not get additional data',
                     exc_info=True)
    return None
    return r

```

29.5 One Logger Per Module That Uses Logging

Whenever you use logging in another module, don't import and reuse a logger from elsewhere. Instead, define a new logger specific to the module like this:

Example 29.6: One Logger Per Module

```

# You can place this snippet at the top
# of models.py, views.py, or any other
# file where you need to log.
import logging

logger = logging.getLogger(__name__)

```

What this gives you is the ability to turn on and off only the specific loggers that you currently need. If you're running into a strange issue in production that you can't replicate locally, you can temporarily turn on DEBUG logging for just the module related to the issue. Then, when you identify the problem, you can turn that logger back off in production.

29.6 Log Locally to Rotating Files

When you create a new Django project with `startproject`, your default settings file is configured to email ERROR and higher log messages to whomever you list in `ADMINS`. This occurs via a handler called `AdminEmailHandler` that comes with Django.

In addition to this, we recommend also writing logs of level INFO and higher to rotating

log files on disk. On-disk log files are helpful in case the network goes down or emails can't be sent to your admins for some reason. Log rotation keeps your logs from growing to fill your available disk space.

A common way to set up log rotation is to use the UNIX `logrotate` utility with `logging.handlers.WatchedFileHandler`.

Note that if you are using a platform-as-a-service, you might not be able to set up rotating log files. In this case, you may need to use an external logging service such as Loggly: loggly.com.

29.7 Other Logging Tips

- Control the logging in settings files per the Django documentation on logging: [docs.djangoproject.com/en/3.2/topics/logging/](https://djangoproject.com/en/3.2/topics/logging/)
- While debugging, use the Python logger at DEBUG level.
- After running tests at DEBUG level, try running them at INFO and WARNING levels. The reduction in information you see may help you identify upcoming deprecations for third-party libraries.
- Don't wait until it's too late to add logging. You'll be grateful for your logs if and when your site fails.
- You can do useful things with the emails you receive when ERROR or higher level events occur. For example, you can configure a PagerDuty (pagerduty.com) account to alert you and your team repeatedly until you've taken action.

PACKAGE TIP: Logutils Provides Useful Handlers

The `logutils` package by Vinay Sajip comes with a number of very interesting logging handlers. Features include:

- Colorizing of console streams under Windows, Linux and Mac.
- The ability to log to queues. Useful in situations where you want to queue up log messages to a slow handler like `SMTPHandler`.
- Classes that allow you to write unit tests for log messages.
- An enhanced `HTTPHandler` that supports secure connections over HTTPS.

Some of the more basic features of `logutils` are so useful that they have been absorbed into the Python standard library!

29.8 Necessary Reading Material

- [docs.djangoproject.com/en/3.2/topics/logging/](https://djangoproject.com/en/3.2/topics/logging/)
- docs.python.org/3/library/logging.html

- docs.python.org/3/library/logging.config.html
- docs.python.org/3/library/logging.handlers.html
- docs.python.org/3/howto/logging-cookbook.html

29.9 Useful Third-Party Tools

- Sentry (sentry.io) aggregates errors for you and is trusted by the authors, Dropbox, AirBnB, and host of other firms. Their product is open source, and they have an awesome history of supporting various developers with their open source efforts. We can't recommend them enough.
- loggly.com (loggly.com) simplifies log management and provides various query tools.

29.10 Summary

Django projects can easily take advantage of the rich logging functionality that comes with Python. Combine logging with handlers and analysis tools, and suddenly you have real power. You can use logging to help you improve the stability and performance of your projects.

In the next chapter we'll discuss signals, which become much easier to follow, debug, and understand with the help of logging.

30 | Signals: Use Cases and Avoidance Techniques

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

31 | What About Those Random Utilities?

31.1 Create a Core App for Your Utilities

Sometimes we end up writing shared classes or little general-purpose utilities that are useful everywhere. These bits and pieces don't belong in any particular app. We don't just stick them into a sort-of-related random app, because we have a hard time finding them when we need them. We also don't like placing them as "random" modules in the root of the project.

Our way of handling our utilities is to place them into a Django app called *core* that contains modules which contains functions and objects for use across a project. (Other developers follow a similar pattern and call this sort of app *common*, *generic*, *util*, or *utils*.)

For example, perhaps our project has both a custom model manager and a custom view mixin used by several different apps. Our *core* app would therefore look like:

Example 31.1: Core App Layout Example

```
core/
__init__.py
managers.py # contains the custom model manager(s)
models.py
views.py # Contains the custom view mixin(s)
```

TIP: Always Make the Core App a Real Django App

We always make the core directory a Django app. At some point we inevitably end up doing at least one of the following:

- Have non-abstract models in *core*.
- Have admin auto-discovery working in *core*.

- Have template tags and filters in *core*.

Now, if we want to import our custom model manager and/or view mixin , we import using the same pattern of imports we use for everything else:

Example 31.2: Importing From the Core App

```
from core.managers import PublishedManager
from core.views import IceCreamMixin
```

31.2 Optimize Apps With Utility Modules

Synonymous with **helpers**, these are commonly called *utils.py* and sometimes *helpers.py*. They are places where we place functions and classes which make common patterns shorter and easier. Let's go into why this is helpful.

31.2.1 Storing Code Used in Many Places

There are times when we have functions or classes used in several places that doesn't quite fit in *models.py*, *forms.py*, or any other specifically named module. When this occurs, we put this logic in the *utils.py* module.

31.2.2 Trimming Models

This is best explained with an example.

We use the `Flavor` model frequently. We start attaching field after field, method after method, property after property, classmethod after classmethod. One day we notice that our *fat model* has reached brobdingnagian proportions and is over a thousand lines of code. Debugging and maintenance have become hard. What do we do?

We start looking for methods (or properties or classmethods) whose logic can be easily encapsulated in functions stored in `flavors/utils.py`. The existing methods (or properties or classmethods) become simple wrappers calling functions from `flavors/utils.py`. The result is a more distributed code base that encourages code reuse as well as *easier testing*.

31.2.3 Easier Testing

A side effect of moving logic from more complex constructs into functions placed in isolated modules is that it becomes easier to test. By isolation we mean it is usually imported

within the app, rather than doing in-app/in-project imports. This causes less business logic overhead, hence making it easier to write tests for what logic is present in the module.

TIP: Make Utility Code Constructs as Focused as Possible

Be it a function or a class, avoid allowing multiple behaviors or conditions. Each utility function should do one and only one thing well. Don't repeat yourself. Don't create utility functions that are duplicates of model behaviors.

31.3 Django's Own Swiss Army Knife

The Swiss army knife is a multi-purpose tool that is compact and useful. Django has a number of useful helper functions that don't have a better home than the `django.utils` package. It's tempting to dig into the code in `django.utils` and start using things, but don't. Most of those modules are designed for internal use and their behavior or inclusion can change between Django versions.

Instead, read docs.djangoproject.com/en/3.2/ref/utils/ to see which modules in there are stable.

TIP: Malcolm Tredinnick on Django's Utils Package.

Django core developer Malcolm Tredinnick liked to think of `django.utils` as being in the same theme as Batman's utility belt: indispensable tools that are used everywhere internally.

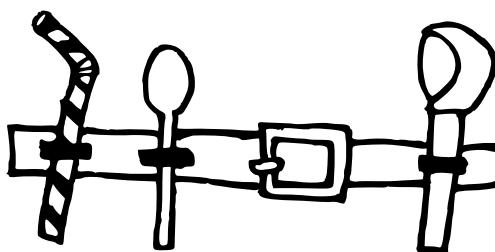


Figure 31.1: A utility belt for serious ice cream eaters.

There are some gems in there that have turned into best practices:

31.3.1 `django.contrib.humanize`

This is a set of localized template filters designed to give user presented data a more 'human' touch. For example it includes a filter called 'intcomma' that converts integers to strings containing commas (or periods depending on locale) every three digits.

While `django.contrib.humanize`'s filters are useful for making template output more attractive, we can also import each filter individually as a function. This is quite handy when processing any sort of text, especially when used in conjunction with REST APIs.

31.3.2 `django.utils.decorators.method_decorator(decorator)`

Django has some really great function decorators. Many of us have written decorators for Django projects, especially when we're working with Function-Based Views. However, there comes a time when we discover that our favorite function decorator would also make sense as a method decorator. Fortunately, Django provides the `method_decorator`

31.3.3 `django.utils.decorators.decorator_from_middleware(middleware)`

Middleware is a wonderful tool, but is global in nature. This can generate extra queries or other complications. Fortunately, we can isolate the use of middleware on a per-view basis by using this view decorator.

Also see the related `decorator_from_middleware_with_args` decorator.

31.3.4 `django.utils.encoding.force_text(value)`

This forces Django to take anything and turn it into a plain `str` representation in Python. It avoids the display of a `django.utils.functional._ProxyObject`. For more details, see [Appendix D](#).

31.3.5 `django.utils.functional.cached_property`

Reinout van Rees educated us about this incredibly useful method decorator introduced in Django 1.5. What it does is cache in memory the result of a method with a single `self` argument as a property. This has wonderful implications in regards to performance optimization of a project. We use it in every project, enjoying how it allows us to cache the results of expensive computations trivially.

For a description on how to use the `cached_property` decorator, the official Django documentation on the subject is excellent: docs.djangoproject.com/en/3.2/ref/utils/#django.utils.functional.cached_property

In addition to the potential performance benefits, we've used this decorator to make sure that values fetched by methods remain static over the lifetime of their object. This has proven very useful when dealing with third-party APIs or dealing with database transactions.

WARNING: Using `cached_property` Outside of Django

It is tempting to copy/paste the source code for `cached_property` for use outside of Django. However, when used outside a web framework, we discovered the code for this function has problems in multithreaded environments. Therefore, if coding outside of Django, use the following options for `cached_property`:

- docs.python.org/dev/library/functools.html?highlight=functools.cached_property for use with Python 3.8 or higher
- github.com/pydanny/cached-property for use with Python 3.7 or older
- daniel.feldroy.com/cached-property.html

31.3.6 `django.utils.html.format_html(format_str, args, **kwargs)`

This is similar to Python's `str.format()` method, except designed for building up HTML fragments. All args and kwargs are escaped before being passed to `str.format()` which then combines the elements.

Reference: docs.djangoproject.com/en/3.2/ref/utils/#django.utils.html.format_html

31.3.7 `django.utils.html.strip_tags(value)`

When we need to accept content from users and have to strip out anything that could be HTML, this function removes those tags for us while keeping all the existing text between tags.

WARNING: Security Advisory on `strip_tags` Safety

When using the `strip_tags` function, or the `striptags` template tag, make absolutely certain that the outputted content is not marked as safe. This especially applies if you have disabled automatic escaping in your templates. Reference: [django.com/weblog/2014/mar/22/strip-tags-advisory/](https://.djangoproject.com/weblog/2014/mar/22/strip-tags-advisory/)

31.3.8 `django.utils.text.slugify(value)`

We recommend that whatever you do, don't write your own version of the `slugify()` function, as any inconsistency from what Django does with this function will cause subtle

yet nasty problems in our data. Instead, we use the same function that Django uses and `slugify()` consistently.

It is possible to use `django.templates.defaultfilters.slugify()` in our Python code, as this calls the function described here. Nevertheless, we like to use the function directly from Django's `utils` directory, as it is a more appropriate import path.

However we decide to import this function, we try to keep it consistent across a project as there is a use case for when it has to be replaced, as described in the next subsection.

31.3.9 Slugification and Languages Besides English

Tomek Paczkowski points out that Django's built-in `slugify()` function can cause problems with localization:

Example 31.3: Slugification That Converts to the English Alphabet

```
>>> from django.utils.text import slugify
>>> slugify('straße') # German
'strae'
```

Fortunately, you can use the `allow_unicode` flag to overcome this issue:

Example 31.4: Slugification That Preserves Original Characters

```
>>> slugify('straße', allow_unicode=True) # Again with German
'straße'
```

PACKAGE TIP: python-slugify

If you want even more control over slugification you can't do wrong with the `python-slugify` package. It provides a greater control over the slugification process, allowing the following benefits:

- ▶ Customizing of separators
- ▶ Detailed control of the case of the outputting string
- ▶ Translation mappings
- ▶ Is Django-independent, which is useful for microservices
- ▶ Lots more!

References: github.com/un33k/python-slugify

31.3.10 django.utils.timezone

It's good practice for us to have time zone support enabled. Chances are that our users live in more than one time zone.

When we use Django's time zone support, date and time information is stored in the database uniformly in UTC format and converted to local time zones as needed.

31.3.11 django.utils.translation

Much of the non-English speaking world appreciates use of this tool, as it provides Django's i18n support. See [Appendix D: Internationalization and Localization](#) for a more in-depth reference.

31.4 Exceptions

Django comes with a lot of exceptions. Most of them are used internally, but a few of them stand out because the way they interact with Django can be leveraged in fun and creative ways. These, and other built-in Django exceptions, are documented at docs.djangoproject.com/en/dev/ref/exceptions.

31.4.1 django.core.exceptions.ImproperlyConfigured

The purpose of this module is to inform anyone attempting to run Django that there is a configuration issue. It serves as the single Django code component considered acceptable to import into Django settings modules. We discuss it in both [Chapter 5: Settings and Requirements Files](#) and [Appendix E: Settings Alternatives](#).

31.4.2 django.core.exceptions.ObjectDoesNotExist

This is the base Exception from which all DoesNotExist exceptions inherit from. We've found this is a really nice tool for working with utility functions that fetch generic model instances and do something with them. Here is a simple example:

Example 31.5: Example Generic Load Function

```
# core/utils.py
from django.core.exceptions import ObjectDoesNotExist

class BorkedObject:
    loaded = False

def generic_load_tool(model, pk):
```

```
try:  
    instance = model.objects.get(pk=pk)  
except ObjectDoesNotExist:  
    return BrokenObject()  
instance.loaded = True  
return instance
```

Also using this exception, we can create our own variant of Django's `django.shortcuts.get_object_or_404` function, perhaps raising a HTTP 403 exception instead of a 404:

Example 31.6: `get_object_or_403`

```
# core/utils.py  
from django.core.exceptions import MultipleObjectsReturned  
from django.core.exceptions import ObjectDoesNotExist  
from django.core.exceptions import PermissionDenied  
  
def get_object_or_403(model, **kwargs):  
    try:  
        return model.objects.get(**kwargs)  
    except ObjectDoesNotExist:  
        raise PermissionDenied  
    except MultipleObjectsReturned:  
        raise PermissionDenied
```

31.4.3 `django.core.exceptions.PermissionDenied`

This exception is used when users, authenticated or not, attempt to get responses from places they are not meant to be. Raising it in a view will trigger the view to return a `django.http.HttpResponseForbidden`.

This exception can prove useful to use in functions that are touching the sensitive data and components of a high-security project. It means that if something bad happens, instead of just returning a 500 exception, which may rightly alarm users, we simply provide a "Permission Denied" screen.

Example 31.7: PermissionDenied in Action

```
# stores/calc.py

def finance_data_adjudication(store, sales, issues):

    if store.something_not_right:
        msg = 'Something is not right. Please contact the support
              ↵ team.'
        raise PermissionDenied(msg)

    # Continue on to perform other logic.
```

In this case, if this function were called by a view and something was ‘not right,’ then the `PermissionDenied` exception would force the view to display the project’s 403 error page. Speaking of 403 error pages, we can set this to any view we want. In the root `URLConf` of a project, just add:

Example 31.8: Specifying a Custom Permission Denied View

```
# urls.py

# This demonstrates the use of a custom permission denied view. The
# view is django.views.defaults.permission_denied
handler403 = 'core.views.permission_denied_view'
```

As always, with exception-handling views, because they handle all HTTP methods equally, we prefer to use function-based views.

31.5 Serializers and Deserializers

Whether it’s for creating data files or generating one-off simple REST APIs, Django has some great tools for working with serialization and deserialization of data of JSON, Python, YAML and XML data. They include the capability to turn model instances into serialized data and then return it back to model instances.

Here is how we serialize data:

Example 31.9: serializer_example.py

```
# serializer_example.py
from django.core.serializers import get_serializer

from favorites.models import Favorite

# Get and instantiate the serializer class
# The 'json' can be replaced with 'python' or 'xml'.
# If you have pyyaml installed, you can replace it with
#   'pyyaml'
JSONSerializer = get_serializer('json')
serializer = JSONSerializer()

favs = Favorite.objects.filter()[:5]

# Serialize model data
serialized_data = serializer.serialize(favs)

# save the serialized data for use in the next example
with open('data.json', 'w') as f:
    f.write(serialized_data)
```

Here is how we deserialize data:

Example 31.10: deserializer_example.py

```
# deserializer_example.py
from django.core.serializers import get_serializer

from favorites.models import Favorite

# Get and instantiate the serializer class
# The 'json' can be replaced with 'python' or 'xml'.
# If you have pyyaml installed, you can replace it with
#   'pyyaml'
JSONSerializer = get_serializer('json')
serializer = JSONSerializer()

# open the serialized data file
with open('data.txt') as f:
```

```

    serialized_data = f.read()

    # deserialize model data into a generator object
    # we'll call 'python data'
    python_data = serializer.deserialize(serialized_data)

    # iterate through the python_data
    for element in python_data:
        # Prints 'django.core.serializers.base.DeserializedObject'
        print(type(element))

        # Elements have an 'object' that are literally instantiated
        # model instances (in this case, favorites.models.Favorite)
        print(
            element.object.pk,
            element.object.created
        )
    )

```

Django already provides a command-line tool for using these serializers and deserializers: the `dumpdata` and `loaddata` management commands. While we can use them, they don't grant us the same amount of control that direct code access to the serializers provides.

This brings us to something that we always need to keep in mind when using Django's built-in serializers and deserializers: they can cause problems. From painful experience, we know that they don't handle complex data structures well.

Consider these guidelines that we follow in our projects:

- Serialize data at the simplest level.
- Any database schema change may invalidate the serialized data.
- Don't just import serialized data. Consider using Django's form libraries or Django Rest Framework serializers to validate incoming data before saving to the database.

Let's go over some of the features provided by Django when working with specific formats:

31.5.1 django.core.serializers.json.DjangoJSONEncoder

Out of the box, Python's built-in JSON module can't handle encoding of date/time or decimal types. Anyone who has done Django for a while has run into this problem. Fortunately for all of us, Django provides a very useful `JSONEncoder` class. See the code example below:

Example 31.11: DjangoJSONEncoder

```
# json_encoding_example.py
import json

from django.core.serializers.json import DjangoJSONEncoder
from django.utils import timezone

data = {'date': timezone.now()}

# If you don't add the DjangoJSONEncoder class then
# the json library will throw a TypeError.
json_data = json.dumps(data, cls=DjangoJSONEncoder)

print(json_data)
```

31.5.2 django.core.serializers.pyyaml

While powered by the third-party library, pyyaml, Django's YAML serializer tools handles the time conversion from Python-to-YAML that pyyaml doesn't.

For deserialization, it also uses the `yaml.safe_load()` function under the hood, which means that we don't have to worry about code injection. See [Section 28.10.3: Third-Party Libraries That Can Execute Code](#) for more details.

31.5.3 django.core.serializers.xml_serializer

By default Django's XML serializer uses Python's built-in XML handlers. It also incorporates elements of Christian Heimes' `defusedxml` library, protecting usage of it from XML bomb attacks. For more information, please read [Section 28.21: Guard Against XML Bombing With defusedxml](#).

31.5.4 rest_framework.serializers

There are times when Django's built-in serializers just don't do enough. Here are common examples of their limitations:

- They only serialize data stored in fields. You can't include data from methods or properties.
- You can't constrain the fields serialized. This can be a security or performance consideration.

When we run into these obstacles, it's a good idea to consider switching to Django Rest Framework's Serializers toolset. They allow for a lot more customization of both the serialization and deserialization process. While that power comes with complexity, we've found it's worth it to use this tool rather than constructing a manual process from scratch.

References:

- django-rest-framework.org/api-guide/serializers/
- Serializing Objects:
[django-rest-framework.org/api-guide/serializers/
#serializing-objects](https://django-rest-framework.org/api-guide/serializers/#serializing-objects)
- Deserializing Objects:
[django-rest-framework.org/api-guide/serializers/
#deserializing-objects](https://django-rest-framework.org/api-guide/serializers/#deserializing-objects)

31.6 Summary

We follow the practice of putting often reused files into utility packages. We enjoy being able to remember where we placed our often reused code. Projects that contain a mix of core, common, util, and utils directories are just that much harder to navigate.

Django's own 'utility belt' includes a plethora of useful tools, including useful functions, exceptions, and serializers. Leveraging them is one of the ways experienced Django developers accelerate development and avoid some of the tangles that can be caused by some of the very features of Django.

Now that we've covered tools to make things work, in the next chapter we'll begin to cover sharing a project with the world.

32 | Deployment: Platforms as a Service

If you're working on a small side project or are a founder of a small startup, you may save time by using a **Platform as a Service (PaaS)** instead of setting up your own servers. Even large projects can benefit from the advantages of using them.

First, a public service message:

TIP: Never Get Locked Into a Platform as a Service

There are amazing services which will host your code, databases, media assets, and also provide a lot of wonderful accessories services. These services, however, can go through changes that can destroy your project. These changes include crippling price increases, performance degradation, unacceptable terms of service changes, untenable service license agreements, sudden decreases in availability, or can simply go out of business.

This means that it's in your best interest to do your best to avoid being forced into architectural decisions based on the needs of your hosting provider. Be ready to be able to move from one provider to another without major restructuring of your project.

We try to make sure that our projects are not intrinsically tied to any hosting solution, meaning that we are not locked into a single vendor's pricing, policies, and functionality.

As a WSGI-compliant framework, Django is supported on many PaaS providers. The most commonly-used Django-friendly PaaS services as of this writing are:

- DigitalOcean App Platform (try.digitalocean.com/app-platform) is fully managed infrastructure by a well-regarded cloud services company.
- PythonAnywhere (pythonanywhere.com) is a Python-powered PaaS that is incredibly beginner-friendly.
- Zappa (github.com/miserlou/zappa) is not technically a PaaS, but turns AWS Lambda into a service that is effectively one. It does require a good knowledge of AWS, especially permissions.
- Heroku (heroku.com) was a popular option. In recent years the quality of documentation and support has diminished, with Heroku no longer providing affordable support for customers.

Why do we like these services? We've evaluated them carefully for our needs. Your needs may be different, so read on about how to choose a PaaS.

32.1 Evaluating a PaaS

When a PaaS is chosen to host a project, that project forces architecture concessions in order for the application to work in their system. Therefore, even if we heed our warning at the top of this chapter, extracting ourselves from the PaaS takes effort and time.

Therefore, when a PaaS is chosen for a project, or while we are using a PaaS, we constantly consider the following:

32.1.1 Compliance

Before you begin evaluating any other aspect, it's critical to check to see if the PaaS meets local or federal mandates. Examples:

- Many medical-based projects in the United States require meeting HIPAA standards. If the PaaS doesn't meet HIPAA standards, and the project contains user medical data and a project is deployed there, *everyone involved is at risk for civil and criminal prosecution under Title II of HIPAA*. See en.wikipedia.org/wiki/HIPAA#Security_Rule
- Most e-commerce projects require at least SSL, and anything dealing with credit cards needs to adhere to PCI. While services like Stripe often make this moot, many projects require internal integration of credit card processing. Make sure the PaaS complies with the PCI specification. See en.wikipedia.org/wiki/Payment_Card_Industry_Data_Security_Standard.
- For the European Union, if you are processing any identifiable data you'll need to follow EU Directive 95/46/EC on the protection of personal data into account. Amongst other things, this places restrictions on exporting such data outside the European Union, especially if your PaaS doesn't participate in the US-EU Safe Harbor.

If in doubt, consult legal counsel.

32.1.2 Pricing

Most PaaS options provide a free or cheap tier for beginner and toy projects. We've gotten a lot of mileage out of this, and it's been great. You can even add extra services for a reasonable monthly fee. However, if one loses track of projects and services, then this 'reasonable fee' can quickly add up to a hefty monthly service bill. Therefore, it's a good idea to keep up on service costs and your monthly provider bills.

At the other end of things, if high traffic is anticipated, it's a good idea to see how much a site will cost with all the settings dialed up. For example, Heroku maxed out on dynos and enterprise PostgreSQL will cost over \$40,000 a month. While the chances of a project needing this much horsepower is slim, the fact that Heroku offers this means that it can and does happen.

While all of this is going on, keep in mind that PaaS companies are under no legal or moral obligation to keep their prices or pricing methods static. In fact, developers we know of have built architecture for projects to take advantage of how billing is done by a PaaS, only to face crippling bills when the said PaaS changes its terms. To make matters worse, because they had tied their internal infrastructure tightly to the billing structure of the PaaS, they lacked the option of quickly moving off.

32.1.3 Uptime

For PaaS this is a very tricky issue. They would really like to provide 99.999999% uptime (sometimes referred to as the 'nines'), but even with the best engineering, it's not entirely under their control:

- Most of them rent space from vendors such as AWS, Azure, and GCP. If those services go down, then they go down.
- All of them are reliant on the physical infrastructure of the internet. Natural disasters or industrial accidents can bring everything to a halt.

Even if we ignore these factors, providing a PaaS infrastructure is a hard business. It's more than standing up servers or Linux containers, it's maintaining a billing system, customer-facing tools, customer contact systems, and a host of other systems. This volume of work, challenging in its own right, can conflict with the business of making sure our projects work and scale as we need them.

That said, because it is integral to their business to provide consistent service, they aim for as high a stability number as they can. In general most PaaS companies have pretty

good uptime, slowly increasing over time as they make continual system improvements. Furthermore, the good companies provide status pages and publish formal reports about any outages or issues. Therefore, we don't bother with reading outage reports that are over a few months old, as they are not indicative of the current engineering status of a company.

However, if there are recent, multiple reports of outages, or a recent outage of an unacceptable duration, we consider other PaaS options.

WARNING: If You Need Very High Uptime

It's worth mentioning that for projects that are life-critical, i.e. people could die if they lack immediate access, then a PaaS is not the right solution. Instead, please use an infrastructure service that provides a formal Service License Agreement.

32.1.4 Staffing

Yes, it's important to know about the staffing level of a PaaS:

- If a PaaS lacks staff, then they can't provide 24x7 engineering support, especially across holidays. No matter how enthusiastic a small shop is, and the deals they offer, they can't fix problems when their engineer is sleeping.
- Do they have the staff to answer emails and problem tickets? If their engineering staff is managing all of these requests, when do they have time to maintain the system?

We recommend testing out their level of support and responsiveness by filing a support ticket early on. Use this opportunity to ask a thoughtful question about something that's unclear in their documentation, or get needed help from their staff.

32.1.5 Scaling

How easy is it to scale up? If an e-commerce site is mentioned on CNN or on national television, can the site be dialed up quickly?

On the flip side, how easy it is to scale back down? Sometimes a traffic spike is followed by slow periods and it should be easy to dial things back.

Finally, how is the automation on the scaling process?

32.1.6 HTTP Server

Most Python-friendly PaaS use Nginx or their own similar systems to serve data, and all of them can handle WSGI. What you have to look out for is that some PaaS only support WSGI, which makes it impossible to use Django Channels.

For example, currently Zappa doesn't use the websocket component of AWS API Gateway. That means it can't support Django Channels or supply GraphQL subscriptions in Ariadne. That said, it does support non-websocket asynchronous tasks via <https://github.com/Miserlou/Zappa#asynchronous-task-execution>.

32.1.7 Documentation

In [Chapter 25: Documentation: Be Obsessed](#) we make it pretty clear that we really care about documentation. While we readily admit to exploiting every channel we know to ask questions (see [Chapter 36: Where and How to Ask Django Questions](#)), we want the services that we use to have good, maintained documentation. It's important to have this as readily-found reference material, and it demonstrates that the PaaS in question is serious about what they do.

TIP: Why We Don't Document How Each PaaS Works

Every PaaS changes their API and documentation over time, some more rapidly than others. Since the Django PaaS space is still evolving rapidly, specific PaaS commands and instructions are not listed here. We ask the reader to follow the documentation listed on the PaaS provider site.

32.1.8 Performance Degradation

Sometimes a project that has been running for a while under consistent load starts to slow down. When this occurs, it could be caused by one or more problems. We use the following workflow:

- ① Check the project's commit history for changes could have caused a performance degradation. There may even be a major bug hiding.
- ② Examine the project for undiscovered performance bottlenecks. See [Chapter 26: Finding and Reducing Bottlenecks](#).
- ③ Ask the PaaS support team to look into the problem. They might have a quick answer for you.
- ④ The physical hardware that the project is running on might have a problem. The 'cloud' is actually hardware and hardware breaks or gets old. Start up a new project instance, port the data, and update the DNS records to match. Sometimes that resolves the issue.
- ⑤ Ask the PaaS support team for further assistance. It doesn't hurt to ask for help, especially as a paying customer.

If none of this works, consider running the project on another PaaS or your own servers. If it runs well in another environment, it might be time to move it off.

TIP: Free/Beginner Tiers Will Run Slowly

The free tier of any PaaS is not going to run fast or handle any significant load. That takes resources that cost the PaaS money. Even with the hefty angel or VC funding in the tech industry, it's just not going to happen. If the PaaS provides a free or inexpensive tier that handles very high loads, see the next section on 'Company Stability.'

32.1.9 Geography

Consider the location of primary usage compared to the location of the PaaS. For example, if the majority of users are in China, then a PaaS that only serves from US-based data centers isn't a good option. Latency issues can cause clients and users to become quickly unhappy with a project.

32.1.10 Company Stability

A PaaS is an enormous undertaking. When done well, it requires a lot of overhead. Engineers, servers, customer support, account, and marketing are all expensive business. Since the advent of PaaS solutions, we've seen a number of them fail because of lack of sales, over expenditure of funds, and sheer exhaustion by overworked staff. Fortunately, they've all provided a grace period during which projects were given time to move off, but it's not realistic to count on that.

Therefore, it behooves us to look at the pricing plans carefully. Once a PaaS is out of its beta or initial launch period, if there isn't a way to capture profitability, then using the PaaS is risky.

32.2 Best Practices for Deploying to PaaS

32.2.1 Aim for Identical Environments

The holy grail of deployment is identical environments between development and production. However, as soon as you decide to use a PaaS, this is no longer possible as the production system configuration is beyond your control. Nevertheless, the closer you can keep things identical between development and production the more maintainable your project will be.

To aid developers working with their systems, all PaaS provide some measure of specifics

as to their hosting environment. With the advent of Docker, some go as far as providing distributions that closely mirror production. We cover this further in [Section 2.5: Optional: Identical Environments](#).

32.2.2 Maintain a Staging Instance

With automation often comes the ability to run staging instances of projects at a lower cost tier. This is a great place to test production deployments, not to mention a place to demo feature changes.

32.2.3 Automate All the Things!

When it comes time to push an update to a production instance, it's never a good idea to do all the steps manually. It's simply too easy to make a mistake. Our solution is to use simple automation using one of the following tools:

- **Makefiles** are useful for simple projects. Their limited capability means we won't be tempted to make things too fancy. As soon as you need more power, it's time to use something else. Something like Invoke as described in the next bullet.
- **Invoke** is the direct descendant of the venerable **Fabric** library. It is similar to Fabric, but is designed for running tasks locally rather than on a remote server. Tasks are defined in Python code, which allows for a bit more complexity in task definitions (although it's easy to take things too far).

32.2.4 Multiple Requirements Files in Multiple Environments

Most PaaS limit themselves to only reading the root *requirements.txt* file. While it can be good to be constrained to identical environments everywhere, under some circumstances we just need different versions of software in different places. For example, production might run Django 3.2.3, and we want staging to run Django 3.2.5.

When this need arises, we fall back on our automation and the use of cascading pip files. For example, let's say we want to deploy with the packages described in *staging.txt* instead of *requirements.txt*. To handle this, we might have a *Makefile* with this commands:

Example 32.1: Makefile for Multiple Requirement Deployments

```
# Makefile
deploystaging:
    echo -r requirements/staging.txt > requirements.txt
    git commit -am "Requirements change for staging deployment"
    echo -r requirements/production.txt > requirements.txt
```

```
git commit -am "Change back to production requirements"
```

32.2.5 Prepare for Disaster With Backups and Rollbacks

Even with all the precautions we take, sometimes deployments just blow up. Therefore, before any change is pushed a live site, we make certain for a particular PaaS we know how to:

- ▶ Restore databases and user-uploaded files from backups.
- ▶ Roll back to a previous code push.

32.2.6 Keep External Backups

The great virtue of PaaS is that they abstract away many deployment and operational issues, allowing us to focus on writing our project. With that comes the risk that the PaaS might encounter their own problems. While most PaaS provide the capability to generate backups to their own systems, it's a good idea to periodically run backups to external services. This includes the databases and uploaded user files.

Suggestions for storing the data include Dropbox, Crashplan, Amazon S3, Google Files, and Azure Files, but there are many more. Which service to choose should be based on architectural decisions such as the location of the PaaS (For example, Elastic Beanstalk- and Heroku-based projects would use Amazon services).

32.3 Summary

Platforms as a Service are a great way to expedite delivery of deployable projects. They allow for developers to quickly harness significant resources that are maintained by specialized operations teams. On the other hand, they do come with a price tag and various limitations. Therefore, deciding to use a PaaS should be based per the project and skill set at hand, not out of personal preference.

In addition, it's a good idea to honor the practices we provide in this chapter, or to listen carefully to peers to determine what they do to best utilize these services.

In the next chapter, we cover the nuts and bolts of deployment at a high level.

33 | Deploying Django Projects

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

34 | Continuous Integration

WARNING: This Chapter is in Progress

We are in the midst of working on this chapter and will expand on it in the days to come. We are open to suggestions on topics and items to cover, please submit them to github.com/feldroy/two-scoops-of-django-3.x/issues

35 | The Art of Debugging

Whether they are in a brand new shiny project or a legacy Django system that's a decade old, bugs just happen. This chapter provides useful tips we can do to make the debugging process better and easier.

35.1 Debugging in Development

These are common tricks and tools for debugging locally.

35.1.1 Use django-debug-toolbar

We've already mentioned this invaluable package repeatedly. It is arguably the easiest/fastest way to display various debug information about the current request/response cycle. If you want to know how fast your templates are rendering, what queries are being made, and what variables are being used, this is the tool.

If you don't have it set up and configured, stop everything else you are doing and add it to your project.

- ▶ <https://pypi.org/project/django-debug-toolbar>
- ▶ django-debug-toolbar.readthedocs.org

35.1.2 That Annoying CBV Error

If you are using CBVs this is an error you might see in the console or a view test:

Example 35.1: That Annoying CBV Error

```
twoscoopspress\$ python discounts/manage.py runserver 8001
Starting development server at http://127.0.0.1:8001/
Quit the server with CONTROL-C.

Internal Server Error: /
```

```
Traceback (most recent call last):
  File
    <"/.envs/oc/lib/python.7/site-packages/django/core/handlers/base.py", line 132, in get_response response =
      <wrapped_callback(request,
        *callback_args, **callback_kwargs)
  File
    <"/.envs/oc/lib/python.7/site-packages/django/utils/decorators.py", line 145, in inner
      return func(*args, **kwargs)
TypeError: __init__() takes exactly 1 argument (2 given)
```

This is a bug that djangonauts of all skill levels introduce into their codebases.

The first thing we do when we see `TypeError: __init__() takes exactly 1 argument (2 given)` in the console is we check our `urls.py` modules. Chances are somewhere we are defining URLs where we forgot to add the `as_view()` method to our CBV routing.

Example of `TypeError` generating code:

Example 35.2: How to Throw a CBV `TypeError`

```
# Forgetting the 'as_view()' method
path('', HomePageView, name='home'),
```

Example of fixed code:

Example 35.3: Correct CBV-calling Code in URLconf

```
path('', HomePageView.as_view(), name='home'),
```

35.1.3 Master the Python Debugger

Also known as just **PDB**, this in essence provides an enhanced REPL for interacting with source code at breakpoints you specify. You can also step forward in the code to see how things change as the code is executed. In regards to Django, there tends to be three places PDB is used:

- ① Inside of test cases.

- ② During an HTTP request against development breakpoints allow us to examine at our own pace the process of evaluating the request.
- ③ To debug management commands.

WARNING: Before Deploying Check for PDB

Having PDB breakpoints in code that reaches production is disastrous as it will stop completion of user requests. Therefore, before deployment, search the code for ‘pdb’. You can also rely on tools like **flake8** to automatically check for existence of pdb (and other problems).

While PDB is useful, it becomes dramatically more powerful when extended by third-party packages such as **ipdb**. What ipdb does is add the **ipython** interface to the PDB interface, turning a handy tool into something worth celebrating with ice cream.

References:

- The Python **breakpoint()** built-in: docs.python.org/3/library/functions.html#breakpoint
- Python’s pdb documentation: docs.python.org/3/library/pdb.html

Packages:

- IPDB: <https://pypi.org/project/ipdb>

35.1.4 Remember the Essentials for Form File Uploads

Unless we consistently work on file uploads, there are two easily forgotten items that will cause file uploads to fail silently. This can be very frustrating, as code that fails silently is harder to debug. Anyway, should there be any problems with file uploads, check the following:

1. Does the `<form>` tag include an encoding type?

Example 35.4: Proper Encoding for File Uploads

```
<form action="{% url 'stores:file_upload' store.pk %}"
      method="post"
      enctype="multipart/form-data">
```

2. Do the views handle `request.FILES`? In Function-Based Views?

Example 35.5: Function-Based Views and File Uploads

```
# stores/views.py

from django.shortcuts import render, redirect, get_object_or_404
from django.views.generic import View

from stores.forms import UploadFileForm
from stores.models import Store

def upload_file(request, pk):
    """Simple FBV example"""
    store = get_object_or_404(Store, pk=pk)
    if request.method == 'POST':
        # Don't forget to add request.FILES!
        form = UploadFileForm(request.POST, request.FILES)
        if form.is_valid():
            store.handle_uploaded_file(request.FILES['file'])
            return redirect(store)
    else:
        form = UploadFileForm()
    return render(request, 'upload.html', {'form': form, 'store':
→ store})
```

Or what about Class-Based Views?

Example 35.6: Class-Based Views and File Uploads

```
# stores/views.py
from django.shortcuts import render, redirect, get_object_or_404
from django.views.generic import View

from stores.forms import UploadFileForm
from stores.models import Store

class UploadFile(View):
    """Simple CBV example"""
    def get_object(self):
        return get_object_or_404(Store, pk=self.kwargs['pk'])

    def post(self, request, *args, **kwargs):
```

```

        store = self.get_object()
        form = UploadFileForm(request.POST, request.FILES)
        if form.is_valid():
            store.handle_uploaded_file(request.FILES['file'])
            return redirect(store)
        return redirect('stores:file_upload', pk=pk)

    def get(self, request, *args, **kwargs):
        store = self.get_object()
        form = UploadFileForm()
        return render(
            request,
            'upload.html',
            {'form': form, 'store': store})

```

TIP: Form-Based Class Based Generic Views

If a view inherits from one of the following then we don't need to worry about `request.FILES` in your view code. Django handles most of the work involved.

- ▶ `django.views.generic.edit.FormMixin`
- ▶ `django.views.generic.edit.FormView`
- ▶ `django.views.generic.edit.CreateView`
- ▶ `django.views.generic.edit.UpdateView`

In these examples we don't provide the code for the `store.handle_uploaded_file()` method. We're just demonstrating where we might place such a method call.

35.1.5 Lean on the Text Editor or IDE

When using a **Text Editor** like Sublime Text, Textmates, Vim, Emacs, or many other choices, find Python and Django specific options or plugins and use them. Even if all they do is highlight code and identify PEP-8 violations, that will help immensely.

When using an **IDE** (Integrated Development Environment) like PyCharm, PyDev, WingIDE, Komodo, etc., then all of the IDE's capabilities with Python and Django should be embraced and used. That means use breakpoints and other advanced features. If we aren't using the IDE to the fullest, then why are we bothering with the effort of setting up the IDE?

Just make sure not to code to the IDE (or Text Editor). See [Section 1.8: Never Code to the IDE \(Or Text Editor\)](#).

TIP: What Is The Best IDE or Text Editor?

“Whatever you prefer the most.”

Each of us is an individual. Whatever flavor of ice cream or source code editor we prefer the most is our own unique expression. The only right answer is the one chosen for ourselves.

For what it is worth, as of 2020 Audrey uses PyCharm and VS Code. Daniel prefers VS Code.

35.2 Debugging Production Systems

There are some bugs that turn up in production that seem impossible to duplicate in development. This happens when there are specific conditions that cannot be easily duplicated locally, including load conditions, third-party APIs, and the size of data. Debugging these problems can be really frustrating and time consuming. This section provides some tips on things that can be done to ease the pain.

35.2.1 Read the Logs the Easy Way

The problem with diving into production log files is they can be so large they obfuscate the cause of errors. Instead, use an error aggregator like [Sentry](#) to get a better view into what is going on in your application.

35.2.2 Mirroring Production

This concept is to mirror production in an environment that can be accessed by the maintainers for the sake of debugging. The growing popularity of modern deployment techniques (PaaS, devops, identical environments) in theory makes this easier to do. Generally, when duplicating a production environment, the following steps are taken:

- ① Behind a firewall or some other protective measure, set up a remote server identical to the production environment.
- ② Copy production data over, taking special care to remove **Personally Identifying Information**. By this, we mean anything that can be used to identify critical details of individual users, including email addresses.
- ③ Provide shell access to those who need it.

Once these steps have been taken, try to replicate the reported bug. If the production mirror is completely inaccessible to anyone outside the product (i.e. behind a firewall), you can even consider changing the `settings.DEBUG` to `True`.

WARNING: Take Special Care With User Data

Ludvig Wadenstein notes that email addresses “might not seem like a big deal to keep around on your dev server, but all it takes is one small mishap and you have sent emails to all of your users.”

The same goes for things like OAuth tokens or API keys to third-party services like stripe.com, Google accounts, or anything else involving authentication or access.

35.2.3 UserBasedExceptionMiddleware

What if you could provide superusers with access to the `settings.DEBUG=True` 500 error page in production? That would make debugging much easier, right? The problem is that having `settings.DEBUG=True` in production is serious security problem. However, thanks to Simon Willison, co-creator of Django, there is a way to use this powerful debugging tool in production.

Example 35.7: UserBasedExceptionMiddleware

```
# core/middleware.py
import sys

from django.views.debug import technical_500_response

class UserBasedExceptionMiddleware:
    def process_exception(self, request, exception):
        if request.user.is_superuser:
            return technical_500_response(request, *sys.exc_info())
```

WARNING: UserBasedExceptionMiddleware is a Security Concern

An attacker that managed to gain access to a super user account might be able to get deeper into the system based on the technical 500 response alone. Please keep this in mind when implementing UserBasedExceptionMiddleware.

35.2.4 That Troublesome `settings.ALLOWED_HOSTS` Error

I see that my old nemesis, `settings.ALLOWED_HOSTS`, has returned.

– Daniel Roy Greenfeld

The `ALLOWED_HOSTS` setting is a list of strings representing the host/domain names that a Django site can serve. This is a wonderful security measure that defaults to `['localhost', '127.0.0.1', '[::1]']` when `settings.DEBUG` is set to `True`. For most projects, this means that Django “just works” during development. However, as soon as `settings.DEBUG` is set to `False`, then `ALLOWED_HOSTS` defaults to an empty list. Django will not start on an empty `ALLOWED_HOSTS` and `settings.DEBUG` set to `True`. Checking the logs will show that `CommandError` errors are being raised.

So what is happening?

- ➊ `settings.DEBUG` is `True`
- ➋ Django has nothing in `ALLOWED_HOSTS` hence can't match the host/domains named against what is being served. For example, trying to serve pages from `example.com` will generate an error because `'example.com'` in `[]` is `False`.
- ➌ Django knows we've made a mistake in deployment and refuses to start, throwing `CommandErrors`.

Therefore, whenever a project is deployed for the first time and always returns a 500 error, check `settings.ALLOWED_HOSTS`. As for knowing what to set, here is a starting example:

Example 35.8: Sample `ALLOWED_HOSTS` Configuration

```
# settings.py
ALLOWED_HOSTS = [
    '.djangopackages.org',
    '.djangopackages.com',
]
```

Reference:

► docs.djangoproject.com/en/3.2/ref/settings/#allowed-hosts

35.3 Feature Flags

An incredibly powerful technique, **Feature Flags** allow us to turn a project's feature on or off via a web-based interface.

TIP: Simon Willison' Advice on Feature Flags

Django project co-creator Simon Willison says:

“Feature flags offer the best bang-for-your-buck of anything I've ever added to a codebase.”

Let's say we're adding a new feature to our site, perhaps the ability to remotely control a robot that serves ice cream. Works great on our laptops, fine on a QA server. Then we push the change to production, thousands of users start to command the robot and it goes haywire. Utter disaster unfolds as chocolate ice cream is served to vanilla ice cream aficionados. We quickly shut everything down then spend days cleaning up the mess. However, the damage is done as ice cream eaters around the world decide not to use our ice cream serving robot.

While a silly example, this kind of thing happens. Identical environments can help, but aren't always the answer. For example, it's not uncommon for users to discover a broken element of a new feature or bug fix that was missed in tests. Anyone who has pushed code to a production server experiences this from time to time. Yes, we can ask people to play around on a QA or staging server, but that isn't the same as having them use the production site for real. What if we could allow a subset of real users (i.e. 'beta users') defined through an admin-style interface to interact with a new feature before turning it on for everyone?

This is what feature flags are all about!

In fact, production problems have been uncovered by having a smaller set of users more willing to try a new, possibly buggy feature. This can include staff, friends of staff, and friendly users willing to try out beta-level features before anyone else gets a chance.

35.3.1 Feature Flag Packages

The most commonly used feature flag package for Django is [django-waffle](#), with django-flags as a proven alternative. You can't go wrong with either one:

- github.com/django-waffle/django-waffle
- github.com/cfpb/django-flags

35.3.2 Unit Testing Code Affected by Feature Flags

One gotcha with feature flags is running tests against code that are turned off by them. How do we know that our new feature is tested when the flag to run them is turned off? The answer to this question is that our tests should cover both code paths, with feature flags on or off. To do this, we need to familiarize ourselves with how to turn a feature flag on or off within the Django testing framework:

- waffle.readthedocs.io/en/latest/testing/automated.html

35.4 Summary

Still can't figure out the problem? No worries, in the next chapter we provide some great tips for asking questions.

36 | Where and How to Ask Django Questions

All developers get stuck at one point or another on something that's impossible to figure out alone. When you get stuck, don't give up!

TIP: The Django Code of Conduct

This chapter provides instructions on how to interact with the Django community. To keep things civil, the Django Software Foundation has instituted a formal code of conduct.

Django's code of conduct applies to all spaces managed by the Django project and the Django Software Foundation. That includes IRC, the forums, and all the mailing lists under djangoproject.com. Amongst other things, the Code of Conduct states participants should be welcoming, considerate and respectful. Harassment and other exclusionary behaviour are not acceptable. The Django Software Foundation Code of Conduct committee deals with possible violations of the Code of Conduct.

The Django Code of Conduct: djangoproject.com/conduct/

If you believe someone is violating the Code of Conduct, whether it's aimed at you or at someone else, please report this to the committee. Even if you aren't sure - they'd rather have a few extra reports about events which turn out not to be a violation, than not know about something that was a violation. The committee will keep your identity confidential.

Reporting Code of Conduct Violations: djangoproject.com/conduct/reporting/

36.1 What to Do When You're Stuck

Follow these steps to increase your chances of success:

- ➊ Troubleshoot on your own as much as possible. For example, if you’re having issues with a package that you just installed, make sure the package has been installed into your virtualenv properly, and that your virtualenv is active.
- ➋ Read through the documentation in detail, to make sure you didn’t miss something.
- ➌ See if someone else has had the same issue. Check Google, mailing lists, and StackOverflow.
- ➍ Can’t find anything? Now ask on StackOverflow. Construct a tiny example that illustrates the problem. Be as descriptive as possible about your environment, the package version that you installed, and the steps that you took.
- ➎ Still don’t get an answer after a couple of days? Try asking on the django-users mailing list, the forums, or IRC.

36.2 Django’s Official Discussion Forum

forum.djangoproject.com is a place for discussing the Django framework and applications and projects that use it. This is also a good place to ask and answer any questions related to installing, using, or contributing to Django.

36.3 Django’s Official IRC Channel

IRC stands for **Internet Relay Chat**. The official #django channel is found on the Libera IRC network (<irc://irc.libera.chat/django>).

A warning to those who are new to IRC: sometimes when you ask a question in a busy IRC channel, you get ignored. Sometimes you even get trolled by cranky developers. Don’t get discouraged or take it personally!

The IRC #django (and #python) channels are run entirely by volunteers. You can and should help out and answer questions there too, whenever you have a few free minutes.

- ➊ When you ask something in IRC, be sure that you’ve already done your homework. Use it as a last resort for when StackOverflow doesn’t suffice.
- ➋ Paste a relevant code snippet and traceback into gist.github.com (or another pastebin).
- ➌ Ask your question with as much detail and context as possible. *Paste the link to your code snippet/traceback.* Be friendly and honest.

TIP: Use a Pastebin!

Don’t ever paste code longer than a few characters into IRC. Seriously, don’t do it. You’ll annoy people. Use a pastebin!

- ④ When others offer advice or help, thank them graciously and make them feel appreciated. A little gratitude goes a long way. A lot of gratitude could make someone's day. Think about how you would feel if you were volunteering to help for free.

36.4 Feed Your Brain

Fill up your ice cream bowl with these tasty tidbits of Django and Python information. They'll help you keep up to date with the latest and greatest.

- ❶ djangoproject.com/community Django Project's Feeds
- ❷ django-news.com by Jeff Triplett and Will Vincent is a well maintained mailing list of Django content including new packages, articles, and updates to the framework.
- ❸ djangochat.com/ by Will Vincent and Carlton Gibson is an entertaining and informative podcast about Django, Python, and more.
- ❹ Subscribe to Python Weekly at pythonweekly.com, a excellent method for finding new articles and packages on the Python programming language.

36.5 Insider Tip: Be Active in the Community

The biggest secret to getting help when you need it is this: be an active participant in the Python and Django communities.

The more you help others, the more you get to know people in the community. The more you put in, the more you get back.

36.5.1 10 Easy Ways to Participate

- ❶ Attend Python and Django user group meetings. Join all the local groups that you can find on wiki.python.org/moin/LocalUserGroups. Search meetup.com for Python and join all the groups near you.
- ❷ Attend Python and Django conferences in your region and country. Learn from the experts. Stay for the entire duration of the sprints and contribute to open source projects. You'll meet other developers and learn a lot.
- ❸ Contribute to open source Django packages and to Django itself. Find issues and volunteer to help with them. File issues if you find bugs.
- ❹ Read and participate in the moderated forums at forum.djangoproject.com/
- ❺ Join #python and #django on Libera Chat and help out.
- ❻ Find and join other smaller niche Python IRC channels. There's #pyladies, and there are also foreign-language Python IRC channels listed on www.python.org/community/irc/.
- ❼ Answer Django questions on StackOverflow.
- ❽ Meet other fellow Djangonauts on Twitter, Facebook, LinkedIn. Be friendly and get to know everyone.

- ❾ Join the Django group on LinkedIn at linkedin.com/groups/50788/, comment on posts, and occasionally post things that are useful to others.
- ❿ Volunteer for diversity efforts. Get involved with Django Girls and PyLadies and help make the Python community more welcoming to women. Remember that there are many angles to diversity: something as small as helping with a PyCon in an underrepresented country can make a major difference.



Figure 36.1: The ice cream eating help desk.

36.6 Summary

One of the strengths of Django is the human factor of the community behind the framework. Assume a friendly, open stance when you need guidance and odds are the community will rise to the task of helping you. They won't do your job for you, but in general they will reach out and attempt to answer questions or point you in the right direction.

37 | Closing Thoughts

While we've covered a lot of ground here in this fifth edition of the book, this is just the tip of the ice cream cone. We're writing more technical books and hope you read them!

As for Two Scoops of Django, if there is another edition, it won't be out until Django 5 is on the horizon. The reason is that Django 3.2 is a Long Term Support version of Django, meaning that the content in this book will remain current until at least April 2024.

We'd genuinely love to hear from you, and so would the rest of the Django community. For specific book content-related feedback, we're using GitHub issues to track submissions and commentary from readers. Report any of the following at github.com/feldroy/two-scoops-of-django-3.x/issues:

- Did you find any of the topics unclear or confusing?
- Any errors or omissions that we should know about?
- What additional topics do you think we should cover in this edition?

We hope that this has been a useful and worthwhile read for you. If you enjoyed reading this book, please tell others by writing a positive review. We need and appreciate your support.

Cheers to your success with your Django projects!

Daniel Roy Greenfeld and Audrey Roy Greenfeld

- blogs: daniel.feldroy.com / audrey.feldroy.com
- dev.to: dev.to/audreyfeldroy / dev.to/danielfeldroy
- GitHub: [@pydanny](https://github.com/pydanny), [@audreyfeldroy](https://github.com/audreyfeldroy), and [@feldroy](https://github.com/feldroy)
- Twitter: [@pydanny](https://twitter.com/pydanny), [@audreyfeldroy](https://twitter.com/audreyfeldroy), and [@feldroyteam](https://twitter.com/feldroyteam)

Appendix A: Packages Mentioned In This Book

This is a list of the third-party Python, Django, and front-end packages that we've described or mentioned in this book. We've also snuck in a few really useful packages that we don't mention in the book but that we feel are extremely useful.

As for the packages that we're currently using in our own projects: the list has some overlap with this list but is always changing. Please don't use this as the definitive list of what you should and should not be using.

Core

Django djangoproject.com

The web framework for perfectionists with deadlines.

django-debug-toolbar django-debug-toolbar.readthedocs.org

Display panels used for debugging Django HTML views.

django-model-utils <https://pypi.org/project/django-model-utils>

Useful model utilities including a time stamped model.

ipdb <https://pypi.org/project/ipdb>

IPython-enabled pdb

Pillow <https://pypi.org/project/Pillow>

Friendly installer for the Python Imaging Library.

Dependency Management

conda <http://docs.conda.io/>

The default package manager for the scientific community.

pip pip-installer.org

Package installer for Python. Comes built-in with Python.

pipenv docs.pipenv.org

Combines Pipfile, Pip, & Virtualenv. Mostly replaces virtualenvwrapper and adds features in the process.

poetry python-poetry.org

Python packaging and dependency management made easy.

virtualenv virtualenv.org

Virtual environments for Python.

virtualenvwrapper doughellmann.com/projects/virtualenvwrapper

Makes virtualenv better for Mac and Linux!

virtualenvwrapper-win <https://pypi.org/project/virtualenvwrapper-win>

Makes virtualenv better for Windows!

Asynchronous

celery celeryproject.org

Distributed task queue.

flower <https://pypi.org/project/flower>

Tool for monitoring and management of Celery tasks.

django-channels <https://pypi.org/project/channels>

Official Django websockets interface, can also be used as task queue.

rq <https://pypi.org/project/rq>

RQ is a simple, lightweight, library for creating background jobs, and processing them.

django-rq <https://pypi.org/project/django-rq>

A simple app that provides django integration for RQ (Redis Queue).

django-background-tasks github.com/arteria/django-background-tasks

Database backed asynchronous task queue.

Database

psycopg2-binary <https://pypi.org/project/psycopg2-binary>

The binaries for the PostgreSQL database adapter.

aldjemy github.com/aldjemy/aldjemy

Integrating SQLAlchemy in Django projects for effective query building purposes.

django-maintenancemode-2 github.com/alsoicode/

django-maintenancemode-2

A database-powered solution great for flipping portions of a site in and out of read-only mode. Not to be used for security-related shutdowns.

Deployment

Invoke <https://pypi.org/project/invoke>

Like Fabric, also works in Python 3.

Supervisor supervisord.org

Supervisord is a client/server system that allows its users to monitor and control a number of processes on UNIX-like operating systems.

Documentation

mkdocs mkdocs.org

Markdown Documentation tool.

Sphinx sphinx-doc.org

ReStructuredText- or Markdown-powered Documentation tool.

Myst Markdown Renderer for Sphinx myst-parser.readthedocs.io

Markdown renderer for Sphinx.

Environment Variables

dynaconf github.com/rochacbruno/dynaconf

Configuration management for Python and Django, works with toml, env, ini, and more.

python-decouple pypi.org/project/python-decouple/

Also works with .ini and .env files.

Forms

django-crispy-forms django-crispy-forms.readthedocs.io

Rendering controls for Django forms. Uses Bootstrap widgets by default, but skinnable.

crispy-tailwind github.com/django-crispy-forms/crispy-tailwind

A Tailwind template pack for django-crispy-forms.

django-floppyforms django-floppyforms.readthedocs.io

Form field, widget, and layout that can work with django-crispy-forms.

Front-End

eslint eslint.org/

Find and fix problems in your JavaScript code.

django-webpack-loader TODO

Logging and Performance Monitoring

Sentry sentry.io

Exceptional error aggregation and performance monitoring, with an open source code base.

Project Templates

All of these are described in [Chapter 3: How to Lay Out Django Projects](#).

Cookiecutter Django github.com/pydanny/cookiecutter-django

A popular Cookiecutter by one of the authors of this book.

django-crash-starter github.com/pydanny/cookiecutter-django

A simplified version of Cookiecutter Django, also by one of the authors of this book.

cookiecutter-django-vue-graphql-aws github.com/grantmcconaughey/cookiecutter-django-vue-graphql-aws

Another sample project layout mentioned in chapter 3 of this book.

Cookiecutter cookiecutter.readthedocs.io

Not explicitly for Django, a command-line utility for creating project and app templates. It's focused, heavily tested and well documented. By one of the authors of this book.

REST APIs

django-rest-framework django-rest-framework.org

The defacto REST package for Django. Exposes model and non-model resources as a RESTful API.

django-jsonview github.com/jsocol/django-jsonview

Provides a simple decorator that translates Python objects to JSON and makes sure decorated views will always return JSON.

django-tastypie django-tastypie.readthedocs.io

Expose model and non-model resources as a RESTful API.

Security

bleach <https://pypi.org/project/bleach>

An easy whitelist-based HTML-sanitizing tool.

defusedxml <https://pypi.org/project/defusedxml>

Must-have Python library if you are accepting XML from any foreign source.

django-admin-honeypot <https://pypi.org/project/django-admin-honeypot>

A fake Django admin login screen to notify admins of attempted unauthorized access.

django-axes github.com/django-pci/django-axes

Keep track of failed login attempts in Django-powered sites.

django-csp github.com/mozilla/django-csp

Adds Content Security Policy to Django.

django-restricted-sessions github.com/mxsasha/django-restricted-sessions

This third-party package lets you restrict sessions to an IP or an IP range and/or the user agent.

django-stronghold github.com/mgrouchy/django-stronghold

Get inside your stronghold and make all your Django views default login_required.

django-two-factor-auth <https://pypi.org/project/django-two-factor-auth>

Complete Two-Factor Authentication for Django.

django-user-sessions <https://pypi.org/project/django-user-sessions>

Django sessions with a foreign key to the user.

Twine <https://pypi.org/project/twine>

Uses only verified TLS to upload to PyPI protecting your credentials from theft. Has other useful features worth looking at.

Testing

coverage coverage.readthedocs.io

Checks how much of your code is covered with tests.

django-test-plus github.com/revsys/django-test-plus

Useful additions to Django's default TestCase, which the Two Scoops authors learned from the creator of this package and continue to use to this day. We're happy to see this bundled up for ease of use.

factory boy https://pypi.org/project/factory_boy

A package that generates model test data.

model bakery https://pypi.org/project/model_bakery

Another package that generates model test data.

mock <https://pypi.org/project/mock>

Not explicitly for Django, this allows you to replace parts of your system with mock objects. This project made its way into the standard library as of Python 3.4.

pytest pytest.org

A mature full-featured Python testing tool that is very useful for Python and Django projects.

pytest-django pytest-django.readthedocs.io

pytest-django is a plugin for py.test that provides a set of useful tools for testing Django applications and projects.

tox tox.readthedocs.io

A generic virtualenv management and test command line tool that allows testing of projects against multiple Python version with a single command at the shell.

nox nox.readthedocs.io

nox is a command-line tool that automates testing in multiple Python environments, similar to tox. Unlike tox, Nox uses a standard Python file for configuration.

User Registration

django-allauth django-allauth.readthedocs.io

General-purpose registration and authentication. Includes Email, Twitter, Facebook, GitHub, Google, and lots more.

python-social-auth github.com/python-social-auth/social-core

Easy social authentication and registration for Twitter, Facebook, GitHub, Google, and lots more.

django-registration github.com/ubernostrum/django-registration

A simple, extensible user-registration app for Django

Views

django-braces django-braces.readthedocs.io

Drop-in mixins that really empower Django's class-based views.

django-vanilla-views django-vanilla-views.org

Simplifies Django's generic class-based views by simplifying the inheritance chain.

Time

pendulum <https://pypi.org/project/pendulum>

Python datetimes made easy, highly recommended by Audrey Roy Greenfeld.

python-dateutil <https://pypi.org/project/python-dateutil>

Provides powerful extensions to Python's datetime module.

pytz <https://pypi.org/project/pytz>

Brings the Olson tz database into Python. This library allows accurate and cross platform timezone calculations. It also solves the issue of ambiguous times at the end of daylight saving time. Library Reference

Miscellaneous

dj-stripe pypi.org/project/dj-stripe

Django + Stripe made easy.

django-compressor django-compressor.readthedocs.io

Compresses linked and inline JavaScript or CSS into a single cached file using Node under the hood.

django-extensions django-extensions.readthedocs.io

Provides shell_plus management command and a lot of other utilities.

django-haystack github.com/django-haystack/django-haystack

Full-text search that works with SOLR, Elasticsearch, and more.

django-js-reverse github.com/ierror/django-js-reverse

Javascript url handling for Django that doesn't hurt.

django-pipeline github.com/jazzband/django-pipeline

Compression of CSS and JS. Use with cssmin and jsmin packages.

django-htmlmin github.com/cobrateam/django-htmlmin

HTML minifier for django.

django-reversion github.com/etianen/django-reversion

An extension to the Django web framework that provides comprehensive version control facilities.

django-watson github.com/etianen/django-watson

Full-text multi-table search application for Django using SQL database features.

envdir github.com/jezdez/envdir A Python port of daemon tools' envdir.

flake8 pypi.org/project/flake8

Checks code quality by using PyFlakes, pep8, and other tools.

isort pypi.org/project/flake8

pip-tools github.com/nvie/pip-tools

A set of tools to keep your pinned Python dependencies fresh.

python-slugify github.com/un33k/python-slugify

A flexible slugify function.

pyyaml pypi.org/project/PyYAML

YAML parser and emitter for Python.

requests docs.python-requests.org

Easy-to-use HTTP library that replaces Python's urllib2 library.

silk github.com/mtford90/silk

Silk is a live profiling and inspection tool for the Django framework. Silk intercepts and stores HTTP requests and database queries before presenting them in a user interface for further inspection.

Appendix B: Troubleshooting Installation

Appendix B: Troubleshooting Installation

This appendix contains tips for troubleshooting common Django installation issues.

Identifying the Issue

Often, the issue is one of:

- ▶ That Django isn't on your system path, or
- ▶ That you're running the wrong version of Django

Run this at the command line:

Example 1: Checking Your Django Version

```
python -c "import django; print django.get_version()"
```

If you're running Django 3.x, you should see the following output:

Example 2: Django Version

```
3.x, where "x" is the version of Django you are using
```

Don't see the same output? Well, at least you now know your problem. Read on to find a solution.

Our Recommended Solutions

There are all sorts of different ways to resolve Django installation issues (e.g. manually editing your PATH environment variable), but the following tips will help you fix your setup in a way that is consistent with what we describe in chapter on The Optimal Django Environment Setup.

Check Your Virtualenv Installation

Is `virtualenv` installed properly on your computer? At the command line, try creating a test virtual environment and activating it.

If you're on a Mac or Linux system, verify that this works:

Example 3: Checking Virtualenv on Mac or Linux

```
$ virtualenv testenv  
$ source testenv/bin/activate
```

If you're on Windows, verify that this works:

Example 4: Checking Virtualenv on Windows

```
C:\code\> virtualenv testenv  
C:\code\> testenv\Scripts\activate
```

Your virtualenv should have been activated, and your command line prompt should now have the name of the virtualenv prepended to it.

On Mac or Linux, this will look something like:

Example 5: Virtualenv Prompt on Mac and Linux

```
(testenv) \$
```

On Windows, this will look something like:

Example 6: Virtualenv Prompt on Windows

```
(testenv) >
```

Did you run into any problems? If so, study the Virtualenv documentation (virtualenv.org) and fix your installation of Virtualenv.

If not, then continue on.

Check if Your Environment Has the right version of Django Installed

With your virtualenv activated, check your version of Django again:

Example 7: Checking the Django Version Again

```
python -c "import django; print django.get_version()"
```

If you still don't see your defined version, then try using pip to install Django into testenv:

Example 8: Pip Installing Django 3.x

```
(testenv) \$ pip install Django==3.2
```

Did it work? Check your version of Django again. If not, check that you have **pip** installed correctly as per the official documentation ([pip-installer.org](#)).

Check for Other Problems

Follow the instructions in the official Django docs for troubleshooting problems related to running django-admin:

docs.djangoproject.com/en/3.2/faq/troubleshooting/

Appendix C: Additional Resources

Appendix C: Additional Resources

This appendix lists additional resources that we feel are timeless. Some of them might be for previous versions of Python or Django, but the concepts they present transcend version.

Timeless Python and Django Material

Books:

Best Django Books (2020)

wsvincent.com/best-django-books/

William Vincent maintains a list of what he considers the best Django books. The books in his list are so good we feel honored to share two places with them.

Speed Up Your Django Tests

gumroad.com/l/suydt

For medium-to-advanced level Djangonauts only, Django technical board member Adam Johnson has written an excellent book on how to accelerate tests. This is a critical issue on larger or more complicated projects.

High Performance Django

amazon.com/High-Performance-Django/dp/1508748128/

highperformancedjango.com

Written with a focus on scaling Django, this book espouses many good practices. Full of useful information and tricks, as well as questions in each section that force you to think about what you are doing.

Two Scoops of Django: Best Practices for Django 1.11 (print)

twoscoopspress.com/products/two-scoops-of-django-1-11

The fourth printed edition of this book.

Web:

Django Packages

djangopackages.org

A directory of reusable apps, sites, tools, and more for your Django projects maintained by the authors of Two Scoops of Django.

Classy Class-Based Views

ccbv.co.uk

A website that has provides detailed descriptions, with full methods and attributes, for each of Django's class-based generic views.

Classy Django Forms

cdf.9vo.lt

Detailed descriptions, with full methods and attributes, for each of Django's form classes and methods.

Classy Django REST Framework

cdrvf.co

Detailed descriptions, with full methods and attributes, for each of Django REST Framework's class-based views and serializers.

Daniel's blog

daniel.feldroy.com/tag/django.html

A good amount of this blog is about modern Django. As the author of this blog is also one of this book's authors, the style of the blog loosely resembles the content of this book. He is in the process of writing updated versions of his outdated Django articles.

Django Model Behaviors

blog.kevinastone.com/django-model-behaviors.html

Kevin Stone explores how to structure models and associated code in large Django projects.

Awesome-Django

awesome-django.com

A curated list of awesome Django apps, projects and resources.

Real Python Blog

realpython.com/blog/categories/django/

In addition to their excellent tutorial book, the Real Python blog contains a lot of useful Django material on a wide range of subjects.

Simple is Better than Complex simpleisbetterthancomplex.com/

Vitor Freitas is an amazing writer on Python and Django, able to turn complex topics into usable components.

Django Tricks djangotricks.com/

Aidas Bendoraitis has spent years curating tips, tricks, and code snippets about Django and Python. He's also the author of the "Django 3 Web Development Cookbook", found on Amazon at <https://amzn.to/3dYaXfQ>

testdrivei.io testdriven.io/blog/topics/django/

Michael Herman has been teaching and writing Django, Python, JavaScript and more for years. We've always found his works enlightening and useful.

Timeless Beginner Django Material

Web:

Official Django 3.0 Documentation

docs.djangoproject.com/en/3.2/

The official Django documentation is incredibly useful. If you've used a previous version of Django, make sure that you are reading the correct edition of the documentation.

Django Girls Tutorial

tutorial.djangogirls.org

Created and maintained by the international Django Girls organization, this is an excellent resource no matter your gender.

Simple is Better than Complex simpleisbetterthancomplex.com/

Vitor Freitas' beginner level material is very well written.

Timeless Beginner Python Material

Learn Python the Hard Way Online Edition

learnpythonthehardway.org

By going right to the source, this free for HTML, paid for video resources, is one of the best places to start. The video resources are especially useful.

Automate the Boring Stuff with Python

[amazon.com/gp/product/1593275994](https://www.amazon.com/gp/product/1593275994)

This fascinating book teaches Python by instructing on how to make boring computer tasks easy through automation. Why update 150 columns of a spreadsheet when Python can do it for you?

Timeless Useful Python Material

Fluent Python

amzn.to/2oHT0Ra

One of our favorite Python books, author Luciano Ramalho tours Python's core language features and libraries, and shows us how to make code shorter, faster, and more readable at the same time.

Effective Python

amzn.to/1NsiqVr

Instructs on many useful practices and techniques when coding in Python.

Python Cookbook, 3rd Edition

amzn.to/I3Sv6q

An incredible book by Python luminaries David Beazley and Brian Jones, it's filled with delicious ice cream recipes... err... incredibly useful Python recipes for any developer using Python 3.3 or greater.

Treading on Python Volume 2

amzn.to/1kVWi2a

Covers more advanced Python structures.

Writing Idiomatic Python 3.3

amzn.to/1aS5df4

Great tips for optimizing your code and increasing the legibility of your work. There are a few places it differs from our practices (imports being the largest area of difference), but overall we concur. A 2.7 version is available at amzn.to/1fj9j7z

JavaScript Resources

WARNING: ATTENTION: Help Wanted!

Books:

Secrets of a JavaScript Ninja (Print and Kindle)

amzn.to/2AknyYp

TODO - Add more good, modern JS books!

Web Resources:

Mozilla Developer Network

developer.mozilla.org/en-US/docs/Web/JavaScript

Stack Overflow

stackoverflow.com/questions/tagged/javascript

TODO - Add at least one more good, modern JS web resource!

WARNING: Stay Away From W3Schools

One problem about JavaScript (and CSS) research on the web is that W3Schools will turn up at the top of search engine results. This is unfortunate, because much of the data there is outdated enough to be incorrect. Be smart and avoid this resource.

We scan the results page for the Mozilla Developer Network (MDN) link, usually around the third position, and click on that one.

Appendix D: Internationalization and Localization

Django and Python provides a lot of very useful tools for dealing with **internationalization**, **localization**, and **Unicode**.

This appendix contains a list of things helpful for preparing your Django application for non-English readers and non-USA users. This list is by no means complete, and we invite the reader to provide additional feedback.

Start Early

It is always easier to start with and grow an internationalized, localized project than to convert an existing project.

Wrap Content Strings with Translation Functions

Every string presented to end users should be wrapped in a translation function. This is described in-depth in the official Django documentation on `django.utils.translation` at docs.djangoproject.com/en/3.2/topics/i18n/translation/. Since that is a lot of text to swallow, the table on the following page is a reference guide for knowing when and where to use what translation function for what tasks.

Function	Purpose	Link
gettext()	For content executed at runtime, e.g. form validation errors.	docs.djangoproject.com/en/3.2/topics/i18n/translation/#standard-translation
gettext_lazy()	For content executed at compile time, e.g. verbose_name in models.	docs.djangoproject.com/en/3.2/topics/i18n/translation/#lazy-translation
django.utils.text.format_lazy()	Replaces the standard str.join() method for joining strings.	docs.djangoproject.com/en/3.2/topics/i18n/translation/#formatting-strings-format-lazy

Table 1: Translation Function Reference

Convention: Use the Underscore Alias to Save Typing

As you know, normally we aren't fans of abbreviations or shortcuts. However, in the case of internationalizing Python code, the existing convention is to use a `_`, or underscore, to save on letters.

Example 9: The Underscore Alias in Action

```
from django.utils.translation import gettext as _

print(_('We like gelato.'))
```

Don't Interpolate Words in Sentences

The golden rule is always have as much grammar as possible in the string, don't let the code piece the grammar together; and generally verbs are the most problematic.

– Patrick McLoughlan

We used to construct translation strings all the time, going so far as to include it in the 1.5 edition of the book. This is when you use slightly-clever code to construct sentences out of various Python objects. For reference, this was part of Example 8.7:

Example 10: Our Bad Code from the 1.5 Edition

```
# DON'T DO THIS!
```

```
# Skipping the rest of imports for the sake of brevity
class FlavorActionMixin:

    @property
    def action(self):
        msg = '{0} is missing action.'.format(self.__class__)
        raise NotImplementedError(msg)

    def form_valid(self, form):
        msg = 'Flavor {0}!'.format(self.action)
        messages.info(self.request, msg)
        return super().form_valid(form)

# Skipping the rest of this module for the sake of brevity
```

While seemingly handy in that it makes for a self-maintaining mixin, it is overly clever in we can't internationalize the result of calling `self.__class__`. In other words, you can't just add `django.utils.translation` the following and expect it to produce anything meaningful for translators to work from:

Example 11: Making Things Impossible For Translators

```
# DON'T DO THIS!
from django.utils.translations import gettext as _

# Skipping the rest of this module for the sake of brevity

def form_valid(self, form):

    # This generates a useless translation object.
    msg = _('Flavor {0}!'.format(self.action))
    messages.info(self.request, msg)
    return super().form_valid(form)

# Skipping the rest of this module for the sake of brevity
```

Rather than writing code that constructs sentences out of various Python constructs, now we write more meaningful dialogues that can be readily translated. This means a little more work, but the result is a more easily translatable project. Hence we now follow this pattern:

Example 12: Use of Complete Strings

```
# Skipping the rest of imports for the sake of brevity
from django.utils.translation import gettext as _

class FlavorActionMixin:

    @property
    def success_msg(self):
        return NotImplemented

class FlavorCreateView(LoginRequiredMixin, FlavorActionMixin,
                      CreateView):
    model = Flavor

    # Slightly longer but more meaningful dialogue
    success_msg = _('Flavor created!')

# Skipping the rest of this module for the sake of brevity
```

For reference, you can combine individual strings representing meaningful sentences and dialogues into larger values. However, you shouldn't build sentences by concatenating pieces, because other languages may require a different order. For the same reason, you should always include punctuation in translated strings. See as follows:

Example 13: Using Punctuation in Translated Strings

```
from django.utils.translation import gettext as _

class FlavorActionMixin:

    @property
    def success_msg(self):
        return NotImplemented

class FlavorCreateView(LoginRequiredMixin, FlavorActionMixin,
                      CreateView):
    model = Flavor

    # Example combining strings
    part_one = _('Flavor created! ')
```

```
part_two = _("Let's go try it!")
success_msg = part_one + part_two

# Skipping the rest of this module for the sake of brevity
```

Unicode Tricks

Here are some things we've learned when dealing with unicode-related issues.

Use `django.utils.encoding.force_text()` Instead of `str()`

When we need to ensure that a useful string-type value is returned, don't use the `str()` built-in. What can happen is that under certain circumstances, instead of returning a `ustr` object, Django will return a nigh-meaningless `django.utils.functional._Proxy__` object, which is a lazy instance of the data requested.

Instead, do as our friend Douglas Miranda suggested to us, and use `django.utils.encoding.force_text`. In the case that you are dealing with a proxy object or lazy instance, it resolves them as strings.

TIP: Django is Lazy

One of the ways that Django does optimizations is via lazy loading, a design pattern which defers initialization of an object until it is needed. The place where this is most used is Django's ORM, as described at docs.djangoproject.com/en/3.2/topics/db/queries/#querysets-are-lazy. This use of lazy objects can cause problems with display of content, hence the need for `django.utils.encoding.force_text()`.

Browser Page Layout

Assuming you've got your content and Django templates internationalized and localized, you can discover that your layouts are broken.

A good Django-based example is Mozilla and their various sites for supporting tools like Firefox. On these sites they handle translations for over 80 languages. Unfortunately, a title that fits the page in English breaks the site in more verbose languages such as German.

Mozilla's answer is to determine the width of a title container, then use JavaScript to adjust the font size of the title text downwards until the text fits into the container with wrapping.

A simpler way of handling this issue is to assume that other languages can take up twice as

much space as English. English is a pretty concise language that, because of its short words, handles text wrapping very well.

The Challenges of Time

Time is a tricky subject even without timezones and different calendering systems. Here are resources to help navigate through time-based coding:

- yourcalendricalfallacyis.com

Appendix E: Settings Alternatives

Here a couple of alternative patterns for managing settings that we feel can be recommended. They avoid the **local_settings anti-pattern** and allow for management of configuration that will work with either the **Environment Variables Pattern** or the **Secrets File Pattern**.

WARNING: Converting Existing Settings is Hard

If you have an existing project using multiple settings modules and you want to convert it to the single settings style, you might want to reconsider. Migrating settings approaches is always a tricky process, and requires deep and wide test coverage. Even with the best test coverage, there is a chance it's not going to be worth it.

For these reasons, we suggest being conservative about switching to new settings approaches. Only do it when the current settings management approach has become a pain point, not when a new method becomes popular.

Twelve Factor-Style Settings

If we're relying on environment variables, why not use the simplest *settings.py* system possible? Bruno Renié, creator of django-floppyforms and FeedHQ (feedhq.org), advocates an alternate approach to Django settings files, in which all environments use the same single settings file.

The argument for this approach is that when using the multiple settings files approach, you end up with environment-specific code. For instance, when doing local development, you're not running the code with production settings. This increases the chance of running into production-specific bugs when you update some code without updating the production settings accordingly.

This style involves using sensible default settings and as few environment specific values as possible. When combined with tools like **Vagrant** and **Docker**, it means that mirroring production is trivial.

Appendix E: Settings Alternatives

It results in a much simpler settings file, and for Twelve Factor App fans, it's right in line with that approach.

If you want to see an example of the approach in action, check out FeedHQ's settings module: github.com/feedhq/feedhq/blob/master/feedhq/settings.py

We've enjoyed this approach for new and smaller projects. When done right, it makes things elegantly simple.

However, it's not a perfect solution for all problems:

- It doesn't provide much benefit for simplification when development environments are drastically different than production.
- It doesn't work as well with projects being deployed to more than one operating system.
- Complex settings on large projects are not really simplified or shortened by this approach. It can be challenging to use on large or complex projects.

If you would like to know more about this approach, we recommend the following articles:

- bruno.im/2013/may/18/django-stop-writing-settings-files/
- 12factor.net/config

Appendix G: Security Settings Reference

In Django, knowing which setting should be set to what value in development vs production requires an unfortunate amount of domain knowledge. This appendix is a reference for better understanding how to configure a Django project for both development and production.

Setting	Development	Production
ALLOWED_HOSTS	any list	See subsection 35.2.4
Cross Site Request Forgery protection	See next page	See next page
DEBUG	True	False
DEBUG_PROPAGATE_EXCEPTIONS	False	False
Email SSL	See next page	See next page
MIDDLEWARE_CLASSES	Standard	Add SecurityMiddleware
SECRET_KEY	Use cryptographic key	See section 5.3
SECURE_CONTENT_TYPE_NOSNIFF	NONE	True
SECURE_PROXY_SSL_HEADER	None	See next page
SECURE_SSL_HOST	False	True
SESSION_COOKIE_SECURE	False	True
SESSION_SERIALIZER	See below	See next page

Table 2: Security Settings Reference

Cross Site Request Forgery Protection Settings

For most cases, the standard Django defaults for these settings are adequate. This list provides references to edge cases and the CSRF setting documentation that might provide mitigation:

- Internet Explorer and CSRF failure: docs.djangoproject.com/en/3.2/ref/settings/#csrf-cookie-age
- Cross-subdomain request exclusion, (e.g. posting from

- vanilla.twoscoopspress.com to chocolate.twoscoopspress.com):
docs.djangoproject.com/en/3.2/ref/settings/#csrf-cookie-domain
- Changing the default CSRF failure view: docs.djangoproject.com/en/3.2/ref/settings/#csrf-failure-view

Email SSL

Django supports secure connections to SMTP servers. We strongly suggest using this feature. Documentation on the following settings begins at docs.djangoproject.com/en/3.2/ref/settings/#email-use-tls

- EMAIL_USE_TLS
- EMAIL_USE_SSL
- EMAIL_SSL_CERTFILE
- EMAIL_SSL_KEYFILE

SESSION_SERIALIZER

Per subsection 28.10.4:

```
SESSION_SERIALIZER = django.contrib.sessions.serializers.JSONSerializer.
```

SECURE_PROXY_SSL_HEADER

For some setups, most notably Heroku, this should be:

```
SECURE_PROXY_SSL_HEADER = ('HTTP_X_FORWARDED_PROTO', 'https')
```

Appendix G: Handling Security Failures

Have a Plan Ready for When Things Go Wrong

Handling security failures is incredibly stressful. There is a sense of urgency and panic that can overwhelm our better judgement, leading to snap decisions that can involve ill-advised ‘bug fixes’ and public statements that worsen the problem.

Therefore, it’s critical that a point-by-point plan be written and made available to maintainers and even non-technical participants of a project. Here is a sample plan:

- ① Shut everything down or put it in read-only mode.
- ② Put up a static HTML page.
- ③ Back everything up.
- ④ After reading docs.djangoproject.com/en/dev/internals/security/, email security@djangoproject.com about your security-related problem, even if it’s your fault.
- ⑤ Start looking into the problem.

Let’s go over these steps:

Shut Everything Down or Put It in Read-Only Mode

The first thing to do is remove the ability for the security problem to continue. That way, further damage is hopefully prevented.

On Heroku:

Example 14: Turning on Maintenance Mode for Heroku Projects

```
\$ heroku maintenance:on  
Enabling maintenance mode for myapp... done
```

For projects you deploy yourself or with automated tools, you're going to have to create this capability yourself. Fortunately, other people have faced this before so we come prepared with reference material:

- cyberciti.biz/faq/custom-nginx-maintenance-page-with-http503 for putting up maintenance 503 pages.
- Other tools can be found at djangopackages.org/grids/g/emergency-management

Put Up a Static HTML Page

You should have a maintenance page formatted and ready to go when you launch your project. This way, when things go wrong and you've shut everything down, you can display that to the end user. If done well, the users might understand and give you the breathing room to work out the problem.

Back Everything Up

Get a copy of the code and then the data off the servers and keep it on a local hard drive or SSD. You might also consider a bonded, professional storage company.

Why? First, when you back things up at this stage, you are protecting your audit trail. This might provide you with the capability to determine where and when things went wrong.

Second, and this might be unpleasant to hear, but malignant staff can cause as many problems as any bug or successful penetration. What that means is that the best software-based security is useless against a developer who creates a backdoor or a non-technical staff level user who decides to cause trouble.

Email security@djangoproject.com, Even if It's Your Fault

As long as your problem is security related, read through docs.djangoproject.com/en/dev/internals/security/, then send a quick email summarizing the problem. Ask for help while you are at it.

There are a number of reasons why this is important:

- Writing up a quick summary will help you focus and gather your thoughts. You're going to be under an amazing amount of stress. The stress and urgency of the situation can make you attempt stupid things that can aggravate the problem.
- You never know, the Django security team might have good advice or even an answer for you.
- It might be a Django problem! If that is the case, the Django security team needs to know so they can mitigate the problem for everyone else before it becomes public.

TIP: Jacob Kaplan-Moss on Reporting to the Django Project

Former Django BDFL and former Director of Security for Heroku Jacob Kaplan-Moss says, “I’d much rather have people send things that aren’t actual problems in Django to security@djangoproject.com than accidentally disclose security issues publicly because they don’t know better.”

Start Looking Into the Problem

You’ve shut things down, backed everything up, are displaying a static HTML page, emailed security@djangoproject.com, and are looking at the problem. By following the above steps, you’ve given yourself (and possibly your team) time to breathe and figure out what really happened.

This will be a stressful time and people will be on the edge of panic. Start doing research, perhaps in this book, ask questions as per [Chapter 36: Where and How to Ask Django Questions](#), and find a resolution.

Before you implement a correction, it’s often better to make sure you have a real, proper fix for the problem then do a rushed emergency patch that destroys everything. Yes, this is where tests and continuous integration shine.

Stay positive: now is the time for everyone to come together and fix the problem. Start taking notes, ask for help from the best people you know, remind yourself (or the team) that you have the will and the smarts to fix things, and make things right!

WARNING: The Nightmare of the Zero-Day Attack

Zero-day attacks are attacks on vulnerabilities that may be known to the public or a closed list but still unpatched. For example:

- Attacks the day of a software update release, right before most people get around to installing the software update.
- Attacks right after a user writes up a blog post about a vulnerability they found, before package maintainers have the chance to write and release a patch.
- Attacks targeting vulnerabilities in discussion on a closed security mailing list.

With zero-day attacks, there is often no time to address and patch the vulnerability, making the compromise especially difficult to manage. If there was ever a reason to have a battle plan for handling security issues, this is it.

See en.wikipedia.org/wiki/0day

Appendix H: WebSockets with Channels

Appendix H: WebSockets with Channels

Already mentioned in [Chapter 27: Asynchronous Task Queues](#), **Channels** provides the capability for Django to handle **WebSockets**. The advantage of using Channels for this purpose is that unlike alternative approaches such as **FastAPI** or **Node.js**, Channels allows us to use Websockets in a way very similar to views. Better yet, by using Channels, we can access our project's code base, allowing us to access our models and other custom code. We've found Channels to be a very powerful tool, especially when we follow the same practices we espouse in the rest of this book.

Keep in mind that the advantage of WebSockets is much more than providing a real-time interface. It's that the protocol is lighter than HTTP. This makes it a faster way to transmit data back and forth between client and server.

Here are our thoughts on using Channels based off lessons learned:

Each Browser Tab Has Its Own WebSocket Connection

If a user has one hundred tabs open to our project, then they are connecting to us with one hundred WebSockets. As can be imagined, this causes browsers to crash and if enough users share this behavior, can overload servers. While we can't realistically force users to close their tabs, we can optimize servers on our end. We cover this in [Chapter 26: Finding and Reducing Bottlenecks](#).

Another option is to track the number of WebSockets a particular user has to your system. If they have more than twenty (or any number of your choosing) open, then close the connections that don't seem to be doing anything. We found this to be a pretty effective way of protecting servers from unnecessary load. Unfortunately, there isn't yet a stock solution for resolving things in this manner.

Expect WebSocket Connections to Drop All the Time

WebSockets in Channels works very differently than the typical Django request-response cycle. Instead of receiving an HTTP request from a user and then sending out an HTTP

response in the form of HTML or JSON, WebSockets open a constant connection, or socket, between the server and the browser. Hence the term ‘WebSocket’.

The problem is that the odds are stacked against the connection’s survival. Let’s go over some of what threatens it, shall we?

- Small amounts of latency between the browser and the server
- The server throws the equivalent of the 500 error
- The server crashes
- The browser tab crashing
- The browser crashing
- The user putting their computer to sleep

Rather than address this problem with some kind of long poll fallback like `socket.io` or `SockJS`, Django Channels just lets the connection die. When this happens, the client has to trigger a new connection. Conveniently, Django Channels provides a small JavaScript library that creates a new connection when the old one dies.

The important thing in all this is to remember is that when using Channels we have to take into account that long polling isn’t an option we can use.

Validate Incoming Data!

WebSockets provide another means for our users to send data to our project. As always, validate incoming data before you do anything else with it. We’ve used both **Django Forms** and **Django REST Framework Serializers** in this capacity. We cover the former technique in depth in [Section 13.1: Validate All Incoming Data With Django Forms](#).

Watch Out For Spaghetti Code

Alright, it’s time for an admission: Our first real effort with Channels turned into a nasty plate of spaghetti code. We had a blast putting it together but when we were done we realized our backend code was unmaintainable.

Later we took our time, leaned on the concept of fat models and helper files documented as we worked, wrote better tests, and embraced Generic Consumers as if they were Class-Based Views. In other words, we practiced what we preach.

In talking to other coders we discovered we weren’t the only ones whose first Channels project turned out messy. The lesson learned from this is that in the excitement to play with Django Channels, it’s easy to make basic mistakes. So do yourself a favor the first time you write Channels code: Remember to take the time and use standard best practices. Especially when it comes to writing tests: channels.readthedocs.io/en/stable/topics/testing.html

Acknowledgments

This book was not written in a vacuum. We would like to express our thanks to everyone who had a part in putting it together.

The Python and Django Community

The Python and Django communities are an amazing family of friends and mentors. Thanks to the combined community we met each other, fell in love, and were inspired to write this book.

Technical Reviewers for 3.x

These reviewers gave us their valuable time, helped catch our mistakes and pointed us in the right direction on many occasions. Here they are in alphabetical order:

Adeyinka Adegbenro Adeyinka Adegbenro is a Software Engineer with a passion for computer science and problem-solving. Outside of work, she enjoys writing(essays and technical tutorials), working out, and watching documentaries. She lives in Lagos, Nigeria.

Carol Willing is a member of Python's Steering Council and a core developer of CPython. She's a Python Software Foundation Fellow and former Director. In 2019, she was awarded the Frank Willison Award [python.org/community/awards/
frank-willison/#carol-willing-2019](https://python.org/community/awards/frank-willison/#carol-willing-2019) for technical and community contributions to Python. With a strong commitment to community outreach, Carol co-organizes PyLadies San Diego and San Diego Python User Group.

Enrique Matías Sánchez is a Software Engineer with a soft spot for System Administration. Besides programming, he enjoys outdoor sports (cycling, hiking, running, climbing...) and learning to gibber in foreign languages. He lives in Zaragoza, Spain and shares a black cat with his charming girlfriend Elena.

Haris Ibrahim KV is a human being working as a Software Developer since 2014 building websites using primarily & Django in order to support his family. Enjoys teaching, writing, singing, religion, learning, and banana roasted in ghee (as opposed to ice cream, so there!).

Iacopo Spalletti tinkers with his computer for more time he would admit, Iacopo met Python and Django in the late '00s and he felt like home. He split his time building things with clients and as opensource, working with the community as a speaker and as organizer and mentor (meetups, Pycon Italia, DjangoCon Europe, DjangoGirls). Lately focusing on avoiding too many bugs in raising a little human being.

Madelene Campos is a recovering professional musician, having earned 2 degrees in music. Despite not studying computer science at University, web development seemed like a natural extension to her musical studies. Programming and music are both powerful and important communication tools. She started on this path in 2015, and has been a professional developer since 2016. Maddie has been happily using Python and Django for a little over 2 years, and hopes to continue on this glorious path!

Modasser Billah is a djangonaut whose favorite pet is Python. He loves to build enterprise software systems in the cloud and currently works as a Lead Software Engineer at BriteCore. Modasser is an AWS certified developer associate and a proponent of leveraging the collective wisdom of software engineers known as best practices. He loves remote work and teams without borders. Modasser has a Bachelor's degree in CS from Bangladesh University of Engineering & Technology and lives in Cumilla, Bangladesh. When he is not coding, he is probably either enjoying today's edition of Dilbert or playing with his toddler daughters Naseeha and Naaera.

Renato Oliveira is a Brazilian Software Engineer and co-founder at Labcodes Software Studio. He has been working with Python and Django for almost 10 years. He loves creating sustainable web applications that don't take forever to add a feature and also helping others to accomplish their tasks.

Security Reviewers for 3.x

The following members of Django's security team reviewed our material related to privacy, authentication, cryptography, and other security-related topics.

Florian Apolloner is a Software Engineer who loves debugging hopeless cases and finding the root causes of weird bugs. He started contributing to Django around 2007, became a member of the Django Team in 2012 and nowadays works as part of the Security Team. He enjoys biking and various winter sports and is living in the kangaroo-free Austria (not Australia ;)).

James Bennett has been using and loving Django since almost the day it was released. He spent five years working at the Lawrence Journal-World where he became directly involved in the project, and has since served as a committer and release manager, a member of the framework's security team and technical board, and on the Board of Directors of the Django Software Foundation. He now lives in California. *Daniel and Audrey met in his PyCon 2010 Djang Deep Dive tutorial, hence he is responsible for Two Scoops of Django.*

Markus Holterman (Security) - Markus Holtermann has been a member of several Open Source communities and projects for over a decade. He gained experience in engineering, application and infrastructure security, and community management by taking on tasks in these communities. Markus is a member of the security team for the Django web framework and has given several conference talks about security in and around Django. In his free time, Markus is a hobby photographer.

Michael Manfre is a software engineer with over two decades of involvement in Open Source projects. He is a member of the Django web framework's security team. Michael's Django contributions started in 2008 and initially focused on maintaining a Microsoft SQL Server database backend and running Django on Windows.

Contributors to the 3.x Alpha

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Matt Braymer-Hayes

Nathan Cox

Ola Sendecka

Jannis Gebauer

Haris Ibrahim KV

Tom Christie

Michael Herman

Humphrey Butau

Sasha Romijn - Security Reviewer

James Bennett - Security Reviewer

Florian Apolloner - Security Reviewer

Aymeric Augustin - Security Reviewer

Contributors to 1.11

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Bartek Ogryczak

Barry Morrison

Kevin Stone

Paul Hallett

Saurabh Kumar

Sasha Romijn - Security Reviewer

Contributors to 1.8

Kenneth Love, Patrick McLoughlan, Sebastián J. Seba, Kevin Campbell, Doug Folland, Kevin London, Ramon Maria Gallart Escolà, Eli Bendersky, Dan O'Donovan, Ryan Currah, Shafique Jamal, Russ Ferriday, Charles L. Johnson, Josh Wiegand, William Vincent, Tom Atkins, Martey Dodo, Krace Kumar Ramaraju, Felipe Arruda Pontes, Ed Patrick Tan, Sven Aßmann, Christopher Lambacher, Colin O'Brien, Sébastien de Menten, Evangelos Mantadakis, Silas Wegg, Michal Hoflich, Markus Holterman, Pat Curry, Gaston Keller, Mihail Russu, Jean-Baptiste Lab, Kaleb Elwert, Tim Bell, Zuhair Parvez, Ger Schinkel, Athena Yao, Norberto Bensa, Abhaya Agarwal, Steve Sarjeant, Karlo Tamayo, Cary Kempston, José Padilla, Konstantinos Faliagkas, Kelsey Gilmore-Innis, Adam Bogdał, Tyler Davis, Javier Liendo, Kevin Xu, Michael Barr, Caroline Simpson, John Might, Tom Christie, Nicolas Pannetier, Marc Tamlyn, Loïc Bistuer, Arnaud Limbourg, Alasdair Nicol, and Ludvig Wadenstein.

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Aymeric Augustin

Barry Morrison

Ken Cochrane

Paul McMillan - Security Reviewer

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The following individuals gave us their invaluable help, aid and encouragement for the initial release of this book. We give special recognition here to Malcolm for his contributions to this book and the world.

Malcolm Tredinnick lived in Sydney, Australia and spent much of his time travelling internationally. He was a Python user for over 15 years and Django user since just after it was released to the public in mid-2005, becoming a Django core developer in 2006. A user of many programming languages, he felt that Django was one of the better web libraries/frameworks that he used professionally and was glad to see its incredibly broad adoption over the years. In 2012 when he found out that we were co-hosting the first PyCon Philippines, he immediately volunteered to fly out, give two talks, and co-run the sprints. Sadly, he passed away in March of 2013, just two months after this book was released. His leadership and generosity in the Python and Django community will always be remembered.

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Laura Gelsomino is an economist keen about art and writing, and with a soft spot for computers, who found the meeting point between her interests the day she discovered LaTeX. Since that day, she habitually finds any excuse to vent her aesthetic sense on any text she can lay her hands on, beginning with her economic models.

We originally typeset the alpha version of the 1.5 edition with iWork Pages. Later editions of the book were written using LaTeX. All editions up to 1.11 have been written on 2011 Macbook Airs. The 3.x edition was written on a mix of Macbook Pros and Macbook Airs.

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