

# Sitecore Connect for Sitecore CMP 1.0

# Installation and configuration guide

A quick guide to installing Sitecore CMP

August 20, 2019



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# **1.1 Prerequisites**

Before installing Sitecore Connect<sup>™</sup> for the Sitecore Content Management Platform (CMP) module, you must have the following:

- Sitecore Experience Platform 9.2, 9.1, and 9.1.1
- Sitecore Content Hub 3.2



# **1.2 Installation**

To install the Sitecore Connect<sup>™</sup> for Sitecore CMP module:

- 1. Download the Sitecore Connect<sup>™</sup> for Sitecore CMP module installation package from http://dev.sitecore.net.
- 2. On the Sitecore Launchpad, click **Control Panel**.
- 3. To open the Installation Wizard, in the **Control Panel**, in the **Administration** section, click **Install a package**.
- 4. Click **Upload package** and follow the steps to upload the CMP package to Sitecore.
- 5. Click **Next** and follow the steps to install the package.



# **1.3 Configuration**

This section describes the following configuration steps for the Sitecore Connect™ for Sitecore CMP module:

- 1. Configure Azure service bus
- 2. Configure the Sitecore Content Hub (create the user, the action, and the trigger)
- 3. Configure the Sitecore Content Hub credentials in Sitecore
- 4. Configure content and field mappings

# 1.3.1 Configure Azure Service Bus

Azure Service Bus is a messaging service hosted on the Azure platform that enables exchanging messages between various applications. For CMP to work, you must configure an Azure Service Bus that receives messages from Sitecore Content Hub when content is created, and messages from Sitecore CMP when content is created or updated.

## 1.3.2 Create a superuser

First, you must create a superuser.

- 1. Open the Sitecore Content Hub, and on the ribbon, click **Manage**.
- 2. On the **Users** tab, click **Add User**.
- 3. In the **Username** field, enter the user name, and click **Save**.

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4. To assign the user to a group, on the **User groups** tab, click **Add to User group**, select the **Superusers** check box, and then click **Select**.

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SELECT CANCEL	SELECT CANCEL

5. To add the user group to the Policy combination, in the **Policy combination** panel, click **Add item**.

The end result should look like this:

iroup memberships ser is a member of the following groups. Make sure all groups are added in e Policy combination panel.	Policy combination Configure whether the various user group policies must be applied separately (Apply any) or combined (Apply all)	
S Everyone	Apply any- of the following policies:	ADD SET ADD ITEM
Superusers X	Everyone •	×
ADD TO USER GROUP	Superusers •	X

- 6. Click Save.
- 7. On the **Details** tab, click **Edit profile**.
- 8. In the Email field, enter an email address, and click **Save**.
- 9. Click **Reset Password**, and click **Yes** to confirm. A password reset link is sent to the email address previously provided (you might need to check your spam box).



## 1.3.3 Create an action

Actions of type *Azure service bus* can connect to an Azure Service Bus and post a message when a certain trigger is fired.

To create an action:

- 1. In the Sitecore Content Hub, click **Manage**.
- 2. Click **Actions**.
- 3. Click New action.
- 4. For example, enter the following values:
  - Name: Sitecore
  - **Type**: Azure Service Bus
  - **Connection string**: enter the URL for the service bus here.
  - **Destination type**: *Topic*
  - **Destination**: *m\_out*

Edit action				×
Name •	Label	Туре	Template	
sitecore		Azure Service Bus	•	
Connection string *	Destination type	Destination *		
Endpoint=sb://stylelabs.sr	Topic	- m_out		
Headers ADD HEADER Values				
ADD VALUE				
			TEST CONNECTION	SAVE CANCEL

- 5. To test the connection to the Azure Service Bus, click **Test Connection**.
- 6. To save the new action, click **Save**.

## 1.3.4 Create a trigger

The Sitecore Content Hub provides users with a Trigger framework, which allows them to configure triggers using the user interface. A trigger is fired when a certain event occurs – with certain conditions – and can initiate a set of actions.

To create a trigger:

- 1. Open the Sitecore Content Hub, and on the ribbon, click **Manage**.
- 2. Click Triggers, and click New trigger.



- 3. On the **General** tab, enter the following values:
  - o Enter a name
  - Enter a description
  - **Objective**: *Entity modification*
  - **Execution type**: In background
- 4. On the **Conditions** tab, click **Add definition**, and in the drop-down list, select **Content**. A new item is added to the list of conditions.
- 5. Add the following definitions:

<b>~</b>	ent <del>-</del> Assets	Collections	Project - P	Print 👻 Crea	te Revie	w DRM -	Manage
← Site	coreCMP						
GENERAL	CONDITIONS	ACTIONS					
ADD DEFINI	TION of the following:	:					
	M.Content)						
Content (							
	tive states (MCont	entToActiveState) •	- added item	contains	• all •	Published 🙁	+

This triggers the content import when an item is moved to the Publish workflow state.

#### Note

You can set up the trigger to be fired upon different events. The previous example shows a trigger that is fired when an item is changed (updated) and in a certain workflow state. Be aware that if you create a trigger that is fired whenever an item changes, this creates traffic and activity (changes in Sitecore) for each and every time an item is saved.

For a complete overview of capabilities, see the Sitecore Content Hub documentation.

- 6. On the **Actions** tab, add the action you created previously (*Sitecore*).
- 7. Click **Save and close**. Confirm to activate the trigger.

#### Note

You can also activate the trigger after you have completed all the configuration settings in Content Hub and in Sitecore. At this point, the trigger might start executing before the configuration is completed.

## 1.3.5 Configure the Sitecore Content Hub credentials in Sitecore

Next, you must specify the relevant user credentials in Sitecore.



In Sitecore, navigate to /sitecore/system/Modules/CMP/Config and set the following fields:

- **Client id and Client Secret** these settings must correspond to the settings of the LogicApp in the OAuth Clients in the Sitecore Content Hub. To verify these settings:
  - o Open the Sitecore Content Hub and on the ribbon, click Manage
  - Click OAuth Clients, click LogicApp, and click Edit.
- **User Name and Password** these fields must correspond to the values in the Sitecore Content Hub for the user that you created previously.
- Content Hub URI set the URI to Sitecore Content Hub

CMP	Quick Info	
Forms	Content Hub Credentials	
Layout		
Media Library	Client Id [shared]:	
iji System	LogicApp	
💋 Aliases		
🛸 Dictionary	Client Secret [shared]:	
1 Languages	manufacture of the second second second	
🖺 List Manager		
🞲 Marketing Control Panel	User Name [shared]:	
👩 Modules	Admin	
🔺 🔷 CMP	Admin	
💣 Config	Password [shared]:	
Experience Explorer	Possivoro [anoreo].	
Publishing targets		
Settings		
🔯 Tasks	Content Hub URI [shared]:	
🍅 Toolbox		
S Workflows		
Templates		
A Pranches	Azure Service Bus	

#### Note

For this release, the user credentials (including the password) must be set in Sitecore. You must make sure you have set up user security properly to avoid abuse of these credentials.

Next, you must specify the Azure Service Bus settings in the Azure Service Bus section. Set the following settings:

- **Connection String** set the connection string for the Azure Service Bus.
- **Incoming topic name** set the name for the topic of the messages posted by the Sitecore Content Hub, posted after the trigger is fired.
- Incoming subscription name set the name of the subscription.



• **Outgoing topic name** - set the name of the topic of the messages posted to the Azure Service Bus after content is imported to Sitecore.

© CMP	
Forms	Azure Service Bus
📥 Layout	Connection String [shared]:
🔤 Media Library	connection string [shoreage
関 System	Endpoint=sb://stylelabs.servicebus.windows.net/;SharedAccess
💋 Aliases	
🗭 Dictionary	Incoming topic name [shared]:
Languages	m_out
List Manager	
Marketing Control Panel	Incoming subscription name [shared]:
🔺 🧊 Modules	sitecore
🔺 🗔 CMP	sitecore
📌 Config	Outgoing topic name [shared]:
Z Experience Explorer	
Publishing targets	m_in
Settings	

#### Note

You must restart the Sitecore website after you set/adjust the connection string.

Finally, you can specify the default language used for creation of content. This language is used when the item created in the Sitecore Content Hub does not have a language specified.

V Allases	Incoming topic name [shared]:
🛸 Dictionary	
Anguages	m_out
📋 List Manager	
😡 Marketing Control Panel	Incoming subscription name [shared]:
🖌 词 Modules	sitecore
🔺 🗔 CMP	
💣 Config	Outgoing topic name [shared]:
Experience Explorer	
Publishing targets	m_in
Settings	
🕨 🔯 Tasks	Settings
🕨 🧊 Toolbox	•
🕨 🖏 Workflows	Default Language [shared, standard value
Templates	en-US
Rranches	



# **1.4 Configure content and field mappings**

To import content, you must create several items:

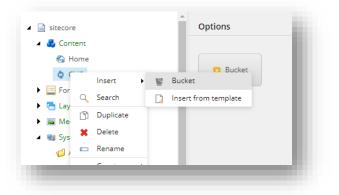
- Bucket(s) where imported content must be stored.
- Template(s) that define the structure of imported content items.
- Entity Mapping item(s) and Field Mapping item(s) that define how imported content is imported and where it is stored.

## 1.4.1 Buckets

All the imported content is stored in Sitecore buckets. For example, all blog posts are stored in a bucket called *Blogs*.

To create a bucket:

1. Right-click the *CMP* folder, click **Insert**, and click **Bucket**.



2. Enter a name and click **OK**.

# 1.4.2 Templates

The structure of the imported content is defined by the Sitecore templates. You must make sure that each template inherits the *Content Hub Entity* template. This template contains the EntityIdentifier field.

To create a template:

- Navigate to a CMP folder and create a template. For example, navigate to: templates\User Defined\CMP Connect
- 2. Add all the necessary fields. For example, for a blog post, add a Title (single line text) and Body (Multi-Line Text) field.



	Name			Shared
🔺 🔷 CMP		1.11		
W Blogs	Content			
Forms				
🕨 📇 Layout				
🕨 🚘 Media Library	Title	Single-Line Text	•	
🕨 🖏 System				
<ul> <li>Templates</li> </ul>	Body	Multi-Line Text		
🕨 🊖 Branches	Body	Word-Line Text		
🔺 🔷 CMP				
<ul> <li> <sup>®</sup> Config Root     </li> </ul>	Add a new field	Single-Line Text		
Content Hub Entity				
<ul> <li>Entity Mapping</li> </ul>	Law			
Field Mapping	Add a new section			
Common				
🕨 🥩 List Manager				
🕨 🍏 System				
G Foundation				
💰 Feature				
😤 Project				
🖌 🥩 Sample				
Sample Item				
🖌 ຝ User Defined				
<ul> <li>User Defined</li> <li>GMP Connect</li> </ul>				

### Important

For this version of CMP Connect, only text-type fields are supported.

3. In the **Data** section, in the **Base template** field, click **Content Hub Entity** and then click the arrow to select it.

uick Info				
em ID:	{B1227571-EA91-4303-BA6C-1280DD0577BF}			
tem name:	Blogs			
tem path:	/sitecore/templates/User Defined/CMP Connect/Blogs			
Template:	/sitecore/templates/System/Templates/Template - {AB86861A-6030-46C5-B394-E8F99E8B87DB}			
Created from:	[unknown]			
tem owner:	sitecore\Admin			
	hared]:			
		•	1. 1	Selected
All	ijdies	•	> <	Selected Standard template Content Hub Entity
All	nates anches AP	^	>	Standard template
All R remp S G CN CN	narces anches AP Config Root	•	>	Standard template
All  All  All  All  All  All  All  All	nates anches MP Config Root Content Hub Entity	•	>	Standard template
<ul> <li>▶ 2000 Br</li> <li>▲ 4000 CM</li> <li>▶ 4000 CM</li> </ul>	narces anches AP Config Root	^	>	Standard template

• To save the template, click **Save**.

#### Note

For this release, Sitecore only supports text field types (Single-Line Text, Multi-Line Text, Rich Text).



# 1.4.3 Entity mapping

*Entity Mapping* items and *Field Mapping* items define how content is imported and in what bucket it is stored.

To create an entity mapping item:

1. Navigate to /sitecore/system/Modules/CMP , right-click **Config**, click **Insert**, and click **Entity Mapping**. Enter the name for the new item, for example *Blog*.

<ul> <li>Marketing Co</li> <li>Modules</li> <li>Modules</li> <li>CMP</li> <li>Confi</li> </ul>	ontro	l Panel Insert	•	User Name [shared]: Admin C Entity Mapping
Ø Experier	Q	Search		] Insert from template
<ul> <li>Q Publishing</li> <li>Settings</li> </ul>	ß	Duplicate		1.0.0
<ul> <li>O Tasks</li> <li>Toolbox</li> </ul>	×	Delete Rename		Content Hub URI [shared]:
<ul> <li>Workflows</li> </ul>		Copying	•	s
Templates		Sorting		
🔺 📩 Branches	P	Edit		
Editor Media Libr	¢) ary	Refresh Workbox	j	Azure Service Bus

This creates a new *Entity Mapping* item:

¢ CMP	Quick Info	
Forms		
Eayout	Data	
🚘 Media Library	Castran Trans Id Johnson Ib	
😼 System	Content Type Id [shared]:	
🧐 Aliases	M.ContentType.Blog	
🐏 Dictionary		
Canguages	Bucket [shared]:	
List Manager		
Marketing Control Panel		
🖌 👩 Modules	Template [shared]:	
4 🔷 CMP		
<ul> <li>d° Config</li> </ul>		
Blog		
Ø Experience Explorer		
Publishing targets		
Settings		
🕅 Tasks		

- 2. In the **Data** section, fill in the following fields:
  - **Content Type Id** enter the content type used in Content Hub.
  - **Bucket** enter the item bucket to keep Sitecore items created from M-Entities of a given content type id.



• **Template** – enter a template to be used to create the Sitecore items. The template must contain the fields that are used to store the imported content.

For example, for the content type *Blog*:

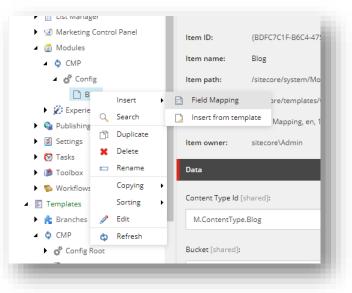
Data			
Content Type Id [shared]:			
M.ContentType.Blog			
Bucket [shared]:			
Content/CMP/Blogs			
Template [shared]:			
Templates/User Defined/Blog			

# 1.4.4 Field mapping

To map imported content to the Sitecore item structure, you must add *Field Mapping* items to each *Entity Mapping* item. You must create a *Field Mapping* item for each field that you want to import.

To create the Field Mapping item:

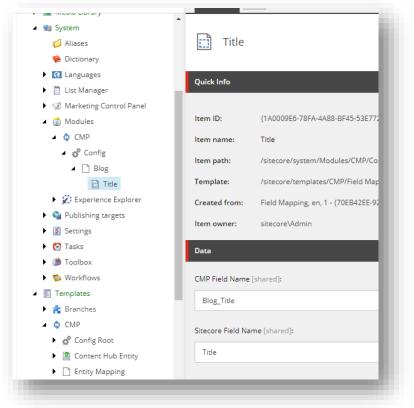
1. Right-click the *Entity Mapping* item that you created earlier, click **Insert**, and then click **Field Mapping**.



- 2. Enter a name and click **OK**, for example, *Title*.
- 3. In the **Data** section, fill in the following fields:
  - **CMP Field Name** the name of the field in the Content Hub.



• Sitecore Field Name - the field name as defined in the template you are using.



4. Add as many *Field Mapping* items as you require.

To verify the entity type and structure in the Content Hub:

- 1. Create a new item in the Content Hub or edit an existing one, for example, a blog post.
- 2. Copy the URL, for example, https://yourdomain/en-us/content/detail/9782 and paste it in a new browser tab.
- 3. Change the URL to https://yourdomain/api/entities/9782 and press enter.

The entity structure is now shown in JSON.

4. To find the entity's content type, find the ContentTypeToContent relation and follow the link ("href": "https://yourdomain/api/entities/9782").



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Now the content type is shown, in this example "M.ContentType.Blog".

```
    {
        "id": 9782,
        "identifier": "M.ContentType.Blog",
        "cultures": [
            "en-US"
        ],
        "properties": {
            "en-US";
            "en-US";
```



# 1.5 Problem solving

To problem solve, you can check the following:

- Check the log in the Sitecore Content Hub for the created trigger. Trigger the event that fires the trigger and then check the log as follows:
  - On the ribbon, click **Manage** .
  - $\circ$  Click Actions.
  - Click the **Auditing** tab.
- Check posted messages in the Azure Service Bus.
- Check the Sitecore log file and scan for any CMP related errors.