Sitecore Connect for Sitecore CMP 2.0

Installation and configuration guide

A quick guide to installing Sitecore CMP

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1.1 Prerequisites

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

- Sitecore Experience Platform 9.3, 9.2, 9.1, and 9.1.1
- Sitecore Content Hub 3.3

1.2 Installation

To install the Sitecore Connect™ for Sitecore CMP module:

1. Download the Sitecore Connect™ 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.

1.2 Installation

1.3 Configuration

This section describes how to:

1. Configure the Sitecore Content Hub (create the user, the action, and the trigger)
2. Add the connection strings.
3. Configure content and field mappings

1.3.1   Create a user

First, you must create a user.

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**.
4. To assign the user to a group, on the **User groups** tab, click **Add to User group**, select the check box, and then click **Select**.
5. To add the user group to the Policy combination, in the **Policy combination** panel, click **Add item**.
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).

1.3.2   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.
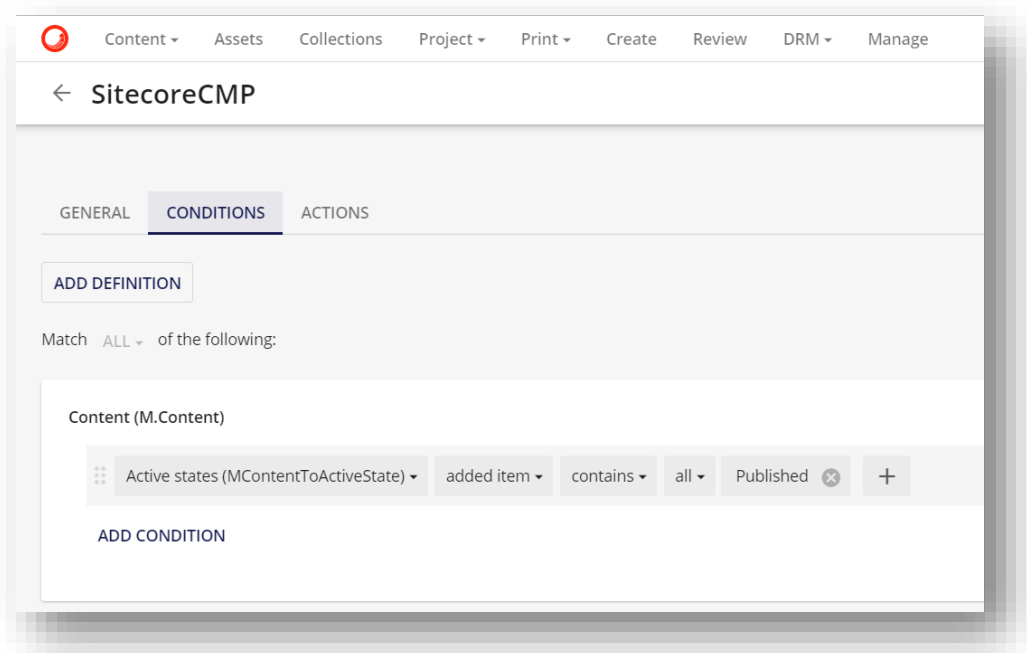
To create an action:

1. In the Sitecore Content Hub, click **Manage**.
2. Click **Actions**.
3. Click **New action**.
4. For example, enter the following values:
   - o **Name**: *Sitecore*
   - o **Type**: *CMP Azure Service Bus*
   - o **Connection string**: enter the connection string for the service bus here.

     The connection string must to be a connection string to the entire azure service bus.
   - o **Destination type**: *Topic*
   - o **Destination**: *hub_out*
5. To test the connection to the Azure Service Bus, click **Test Connection**.
6. To save the new action, click **Save**.

1.3.3   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: *CMP content modification*

   o   Enter a description: *Post to Azure Service Bus after content change*

   o   **Objective**: *Entity modification*

   o   **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:

This triggers the content import when an item is moved to the *Approved for publication* workflow state.

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

6. On the **Actions** tab, add the action you created previously (*CMP content modification*).

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.

1.3.4   Add the connection strings

After you installed the package, open the `ConnectionStrings.config` file (`C:\inetpub\<site>\App_Config`) and add the following connection strings:

```
<add name="CMP.ContentHub"
connectionString="ClientId={client_id};ClientSecret={client_secret};UserName={username};Password={password};URI={uri};" />

<add name="CMP.ServiceBusEntityPathIn" connectionString="{Azure Service Bus connection string with incoming topic}" />

<add name="CMP.ServiceBusSubscription" connectionString="{Subscription name}" />

<add name="CMP.ServiceBusEntityPathOut" connectionString="{Azure Service Bus connection string with outcoming topic}" />
```

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: 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.

- **URI** - set the URI to Sitecore Content Hub

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

- **Subscription name** - set the name of the subscription.

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

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

1.4 Configure content and field mappings

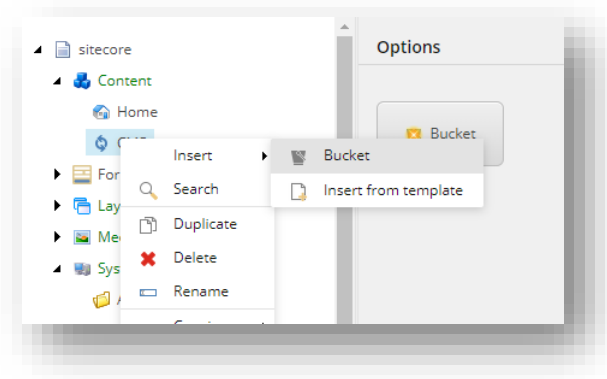To import content, you must create several items:

- 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**.

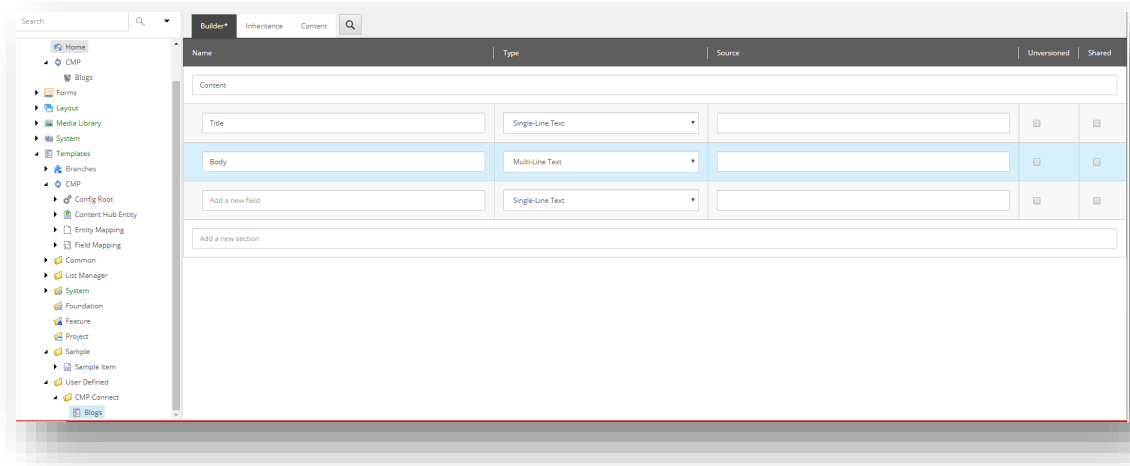2. Enter a name and click **OK**.

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.
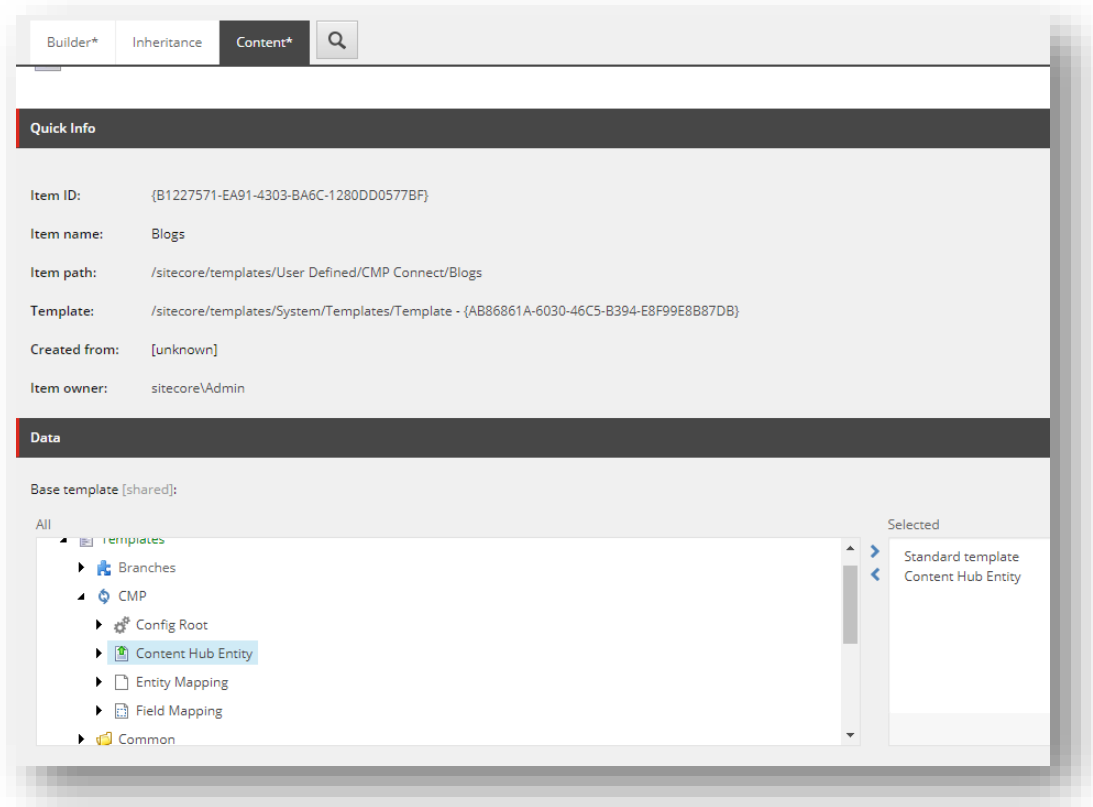
To create a template:

1. 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.

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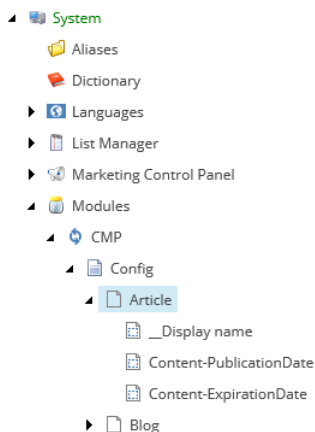

- To save the template, click **Save**.

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 *Article*.
By default, every entity mapping comes with default field mappers for the display name, the publication date, and the expiration date.

2. In the **Data** section, fill in the following fields:

   o **Content Type Id** – enter the content type used in Content Hub.

   o **Bucket** – enter the item bucket to keep Sitecore items created from M-Entities of a given content type id.

   o **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.
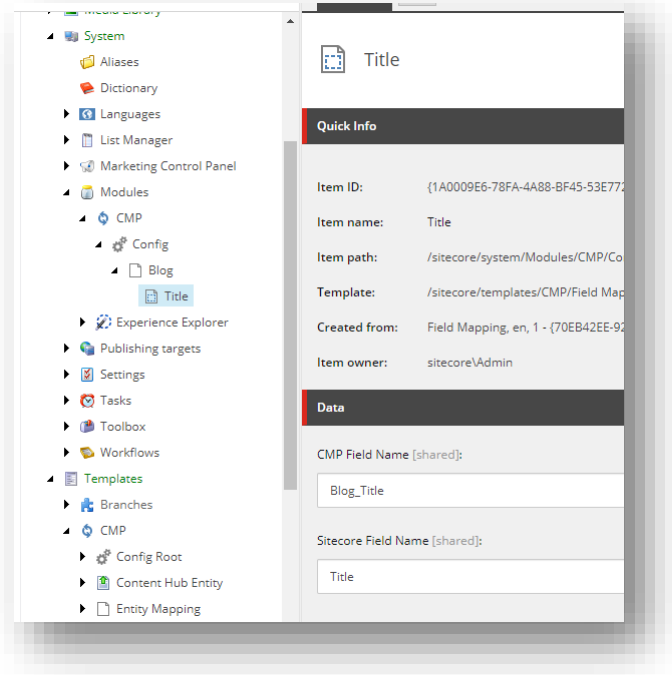
1.4.4 Field mapping

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:

   o **CMP Field Name** - the name of the field in the Content Hub.

o   **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"`).

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

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

1.5 Problem solving

To solve a problem, 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:

  o On the ribbon, click **Manage** .

  o Click **Actions.**

  o Click the **Auditing** tab.

- Check posted messages in the Azure Service Bus.

- Check the Sitecore log file and scan for any CMP related errors.