

Siteimprove CMS Plugin



AEM Plugin Installation guide



Objectives

The Siteimprove CMS plugin bridges the gap between AEM and the Siteimprove Intelligence Platform. Now you can scan your website for errors as soon as a page is published, allowing you to fix mistakes, optimize content, and manage your site more efficiently.

Supported AEM versions

The Plugin has been verified to work with the following AEM versions in Touch UI:

- AEM 6.3.3.8
- AEM 6.4 SP2+
- AEM 6.5.4

Prepare for the Installation

Before you start the Installation process you need to create a specific API user and create an API key.

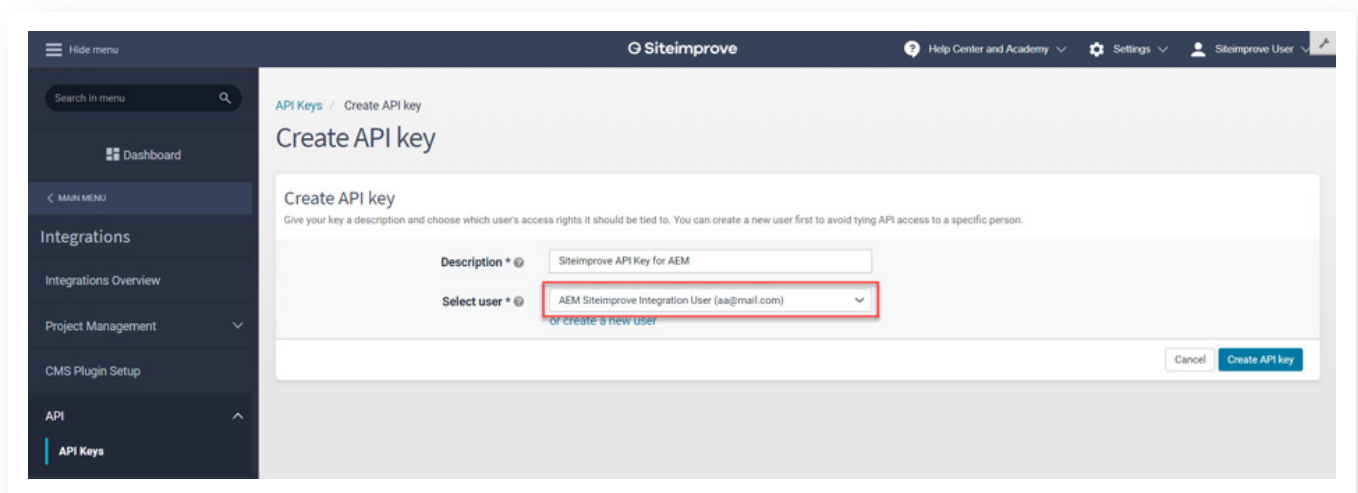
● How to create an API key to use AEM's Workflow and Unpublish functionality

Siteimprove recommends to create one single API user/key that will be used when you are working with AEM's Workflow and Unpublish functionality.

● Preparation

Before you install the new version of the Siteimprove's AEM plugin and create the necessary API key, add a new user for Siteimprove's AEM integration. **You can read more about how to add a user in Siteimprove's Help Center.**

1. Navigate to **Integrations > API > API Keys**
2. Click on **Create API key** button
3. Enter a **description** for the API Key

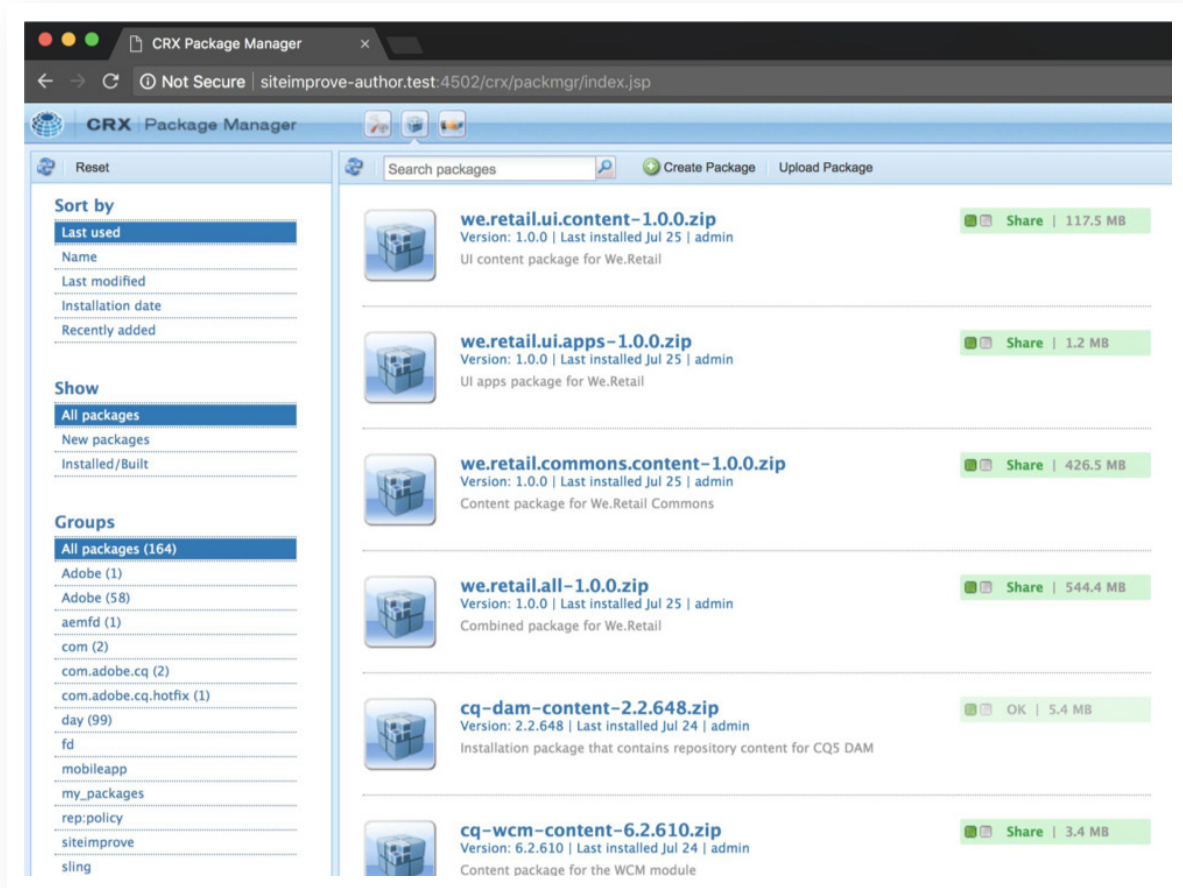


4. **Select the user** for Siteimprove's AEM integration from the above preparation step
5. Click **Create Api Key**
6. A new API key will be created for you
7. Use the **new API Key to set up Siteimprove integration** in your AEM environment.

Plugin installation

Package Manager Installation

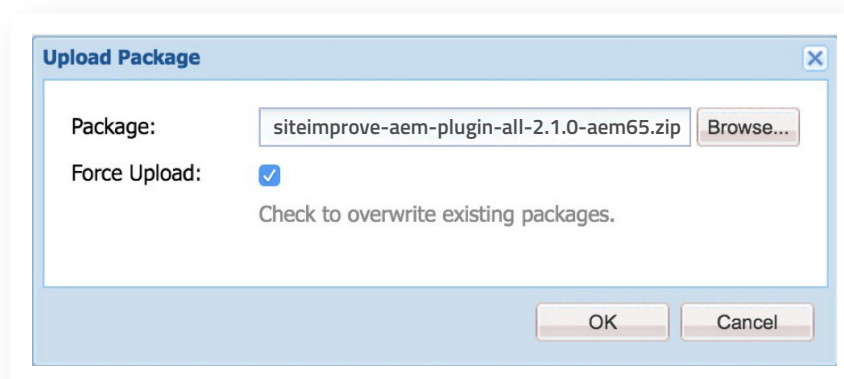
Go to **AEM Package Manager** (<http://localhost:4502/crx/packmgr/index.jsp>):



Click on **Upload Package** and select the Siteimprove plugin package matching your AEM version:

- **for your local AEM Cloud Service SDK:** siteimprove-aem-plugin-all-2.1.0-cloud.zip,
- **for AEM 6.5:** siteimprove-aem-plugin-all-2.1.0-aem65.zip,
- **for AEM 6.4:** siteimprove-aem-plugin-all-2.1.0-aem64.zip.

Click **OK**.



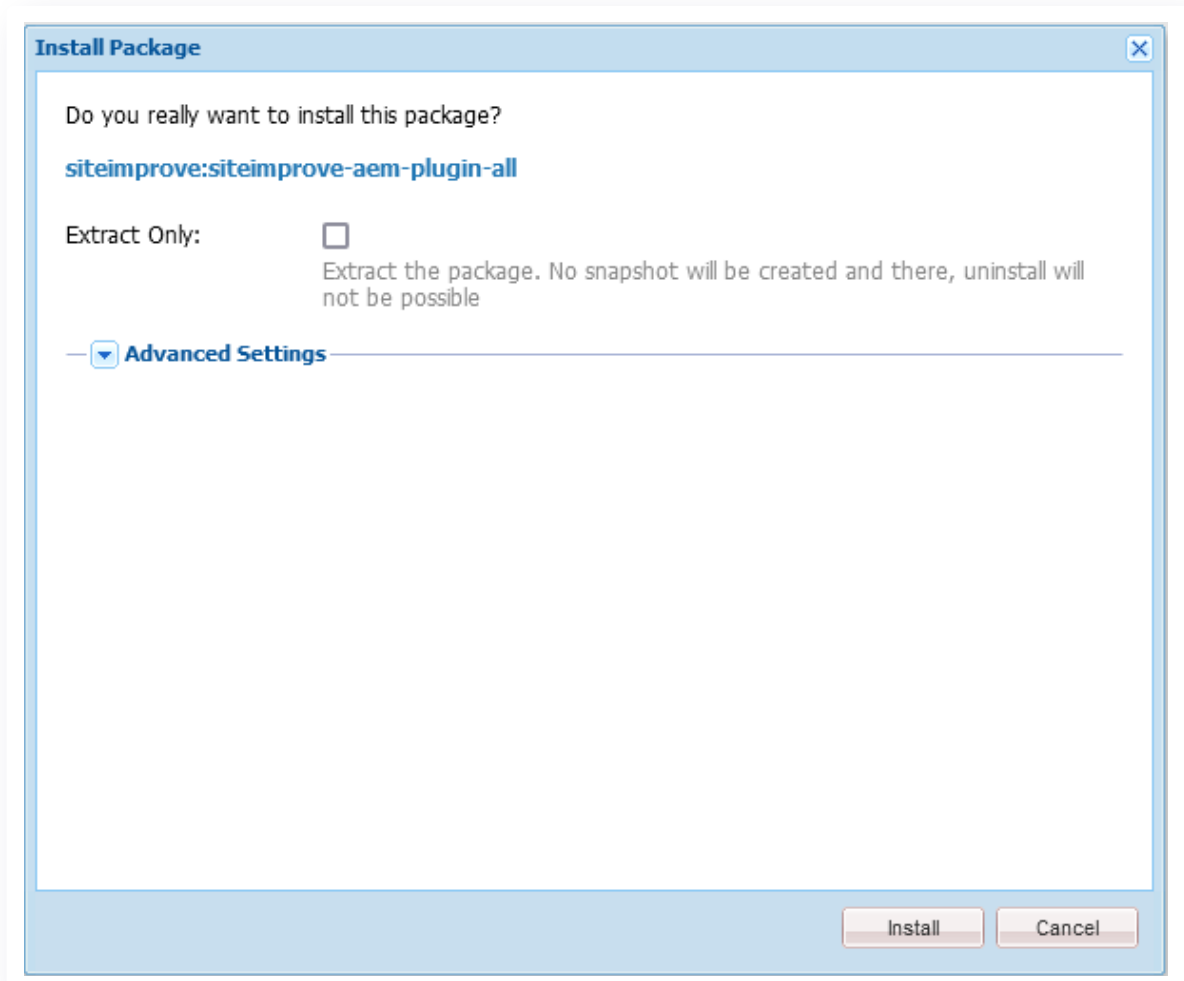
Afterwards you will see the uploaded package:



The screenshot shows a package management interface. On the left is a small icon of a blue cube. To its right, the package name is **siteimprove-aem-plugin-all-2.1.0.zip** with the version **2.1.0**. A warning message states: **A different version seems to be installed: 2.0.6-SNAPSHOT**. Below this, the package path is shown as `Siteimprove :: AEM Plugin :: Package :: All`. A toolbar contains buttons for **Edit**, **Build**, **Install**, **Download**, and a **More** dropdown menu. The package details are listed as follows:

- Package:** siteimprove-aem-plugin-all
- Download:** [siteimprove-aem-plugin-all-2.1.0.zip](#) (984.2 KB)
- Group:** siteimprove
- Filters:**
 - /apps/siteimprove/install
 - /apps/siteimprove/configs
 - /apps/siteimprove-packages/application/install.author
 - /siteimprove-aem-plugin-apps-2.1.0-aem65.zip
 - /apps/siteimprove-packages/application/install.author
 - /siteimprove-aem-plugin-api-2.1.0-aem65.jar
 - /apps/siteimprove-packages/application/install.author
 - /siteimprove-aem-plugin-bundle-2.1.0-aem65.jar
 - /apps/siteimprove-packages/content/install.author
 - /siteimprove-aem-plugin-content-2.1.0-aem65.zip

Clicking on **Install** shows this dialog where you click again on **Install**:



The screenshot shows an **Install Package** dialog box. The title bar includes a close button (X). The main content area asks: **Do you really want to install this package?** Below this, the package name **siteimprove:siteimprove-aem-plugin-all** is displayed. There is an **Extract Only:** section with an unchecked checkbox and the text: **Extract the package. No snapshot will be created and there, uninstall will not be possible**. At the bottom left, there is a collapsed **Advanced Settings** section. At the bottom right, there are **Install** and **Cancel** buttons.

Check the **activity log**, it should not display any errors:

```
Activity Log
Install Package: /etc/packages/siteimprove/siteimprove-aem-plugin-all-2.1.0.zip
Fri Mar 18 2022 12:46:24 GMT+0100 (Central European Standard Time)

Installing content
Creating snapshot for package siteimprove:siteimprove-aem-plugin-all:2.1.0
A META-INF
A META-INF/MANIFEST.MF
A META-INF/vault
A META-INF/vault/config.xml
A META-INF/vault/filter.xml
A META-INF/vault/nodetypes.cnd
A META-INF/vault/properties.xml
A /.content.xml
A /apps
A /apps/.content.xml
- Aggregation status: 1 of 0 prepared, 0 collected
A META-INF/vault/definition/.content.xml
Collecting import information...
Installing node types...
Installing privileges...
Importing content...
A /apps/siteimprove
A /apps/siteimprove/configs
A /apps/siteimprove/configs/config.author
A /apps/siteimprove/configs/config.author/org.apache.sling.serviceusermapping.impl.ServiceUserMapperImpl.amended-siteimprove-service.config
A /apps/siteimprove/configs/config.author/org.apache.sling.serviceusermapping.impl.ServiceUserMapperImpl.amended-siteimprove-service.config/jcr:content
A /apps/siteimprove/configs/config.author/org.apache.sling.serviceusermapping.impl.ServiceUserMapperImpl.amended-siteimprove-service.config/jcr:data
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.cfg.json
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.cfg.json/jcr:content
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.cfg.json/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config/jcr:content
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove-service.cfg.json
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove-service.cfg.json/jcr:content
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove-service.cfg.json/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove.cfg.json
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove.cfg.json/jcr:content
A /apps/siteimprove/configs/config.author/org.apache.sling.commons.log.LogManager.factory.config-siteimprove.cfg.json/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config/jcr:content
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveConfigurationServlet.config
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveConfigurationServlet.config/jcr:content
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveConfigurationServlet.config/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/org.apache.sling.jcr.repoinit.RepositoryInitializer-siteimprove.config
A /apps/siteimprove/configs/config.author/org.apache.sling.jcr.repoinit.RepositoryInitializer-siteimprove.config/jcr:content
A /apps/siteimprove/configs/config.author/org.apache.sling.jcr.repoinit.RepositoryInitializer-siteimprove.config/jcr:content/jcr:data
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.config
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.config/jcr:content
A /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.config/jcr:content/jcr:data
A /apps/siteimprove-packages
A /apps/siteimprove-packages/application
A /apps/siteimprove-packages/application/install.author
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-apps-2.1.0-aem65.zip
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-apps-2.1.0-aem65.zip/jcr:content
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-apps-2.1.0-aem65.zip/jcr:content/jcr:data
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-api-2.1.0-aem65.jar
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-api-2.1.0-aem65.jar/jcr:content
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-api-2.1.0-aem65.jar/jcr:content/jcr:data
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-bundle-2.1.0-aem65.jar
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-bundle-2.1.0-aem65.jar/jcr:content
A /apps/siteimprove-packages/application/install.author/siteimprove-aem-plugin-bundle-2.1.0-aem65.jar/jcr:content/jcr:data
A /apps/siteimprove-packages/content
A /apps/siteimprove-packages/content/install.author
A /apps/siteimprove-packages/content/install.author/siteimprove-aem-plugin-content-2.1.0-aem65.zip
A /apps/siteimprove-packages/content/install.author/siteimprove-aem-plugin-content-2.1.0-aem65.zip/jcr:content
A /apps/siteimprove-packages/content/install.author/siteimprove-aem-plugin-content-2.1.0-aem65.zip/jcr:content/jcr:data
saving approx 50 nodes...
Package imported.
DeinstallHook is active in siteimprove:siteimprove-aem-plugin-all:2.1.0
Bundles in package {}
Config /apps/siteimprove/configs/config.author/org.apache.sling.serviceusermapping.impl.ServiceUserMapperImpl.amended-siteimprove-service.config has not been installed
Config /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl.config has not been installed
Config /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.SiteimproveConfigurationServlet.config has not been installed
Config /apps/siteimprove/configs/config.author/org.apache.sling.jcr.repoinit.RepositoryInitializer-siteimprove.config has not been installed
Config /apps/siteimprove/configs/config.author/com.siteimprove.aem.plugin.impl.contentcheck.rendering.ContentRenderFilter.config has not been installed
Installing 0 bundles and 5 configs
Updating resources [InstallableResource, priority=2000, id=/apps/siteimprove/configs/config.author/org.apache.sling.jcr.repoinit.RepositoryInitializer-siteimprove.config,
Waiting for 0 bundles / 5 configs to be installed
All 0 bundles / 5 configs have been successfully installed in 1002ms
Waited 73940ms in total for OSGi events to become quiet (for at least 5sec)

Package installed in 77198ms.
```

Curl installation

The package can also be installed via curl:

- For AEM 6.4 use:

```
curl -u admin:admin \
-F file="@siteimprove-aem-plugin-all-2.1.0-aem64.zip" \
-F name="siteimprove-aem-plugin-all-2.1.0-aem64.zip" \
-F force=true \
-F install=true \
```

<http://localhost:4502/crx/packmgr/service.jsp>

- **For AEM 6.5 use:**

```
curl -u admin:admin \  
-F file=@"siteimprove-aem-plugin-all-2.1.0-aem65.zip" \  
-F name="siteimprove-aem-plugin-all-2.1.0-aem65.zip" \  
-F force=true \  
-F install=true \  
http://localhost:4502/crx/packmgr/service.jsp
```

Post Installation tasks

When using the dispatcher module for your authoring instance please ensure to flush the following files after installation:

No minification activated

- /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.css
- /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.js

Minification activated

- /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.min.css
- /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.min.js

Troubleshooting

Verify that the paths shown in the filter of siteimprove-aem-plugin-package exist in the repository. If they are not existing, you need to verify your customizations to not override these paths.

Overlaid paths:

/apps/granite/ui/content/globalhead/siteimprove

/apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/toggleContentCheck

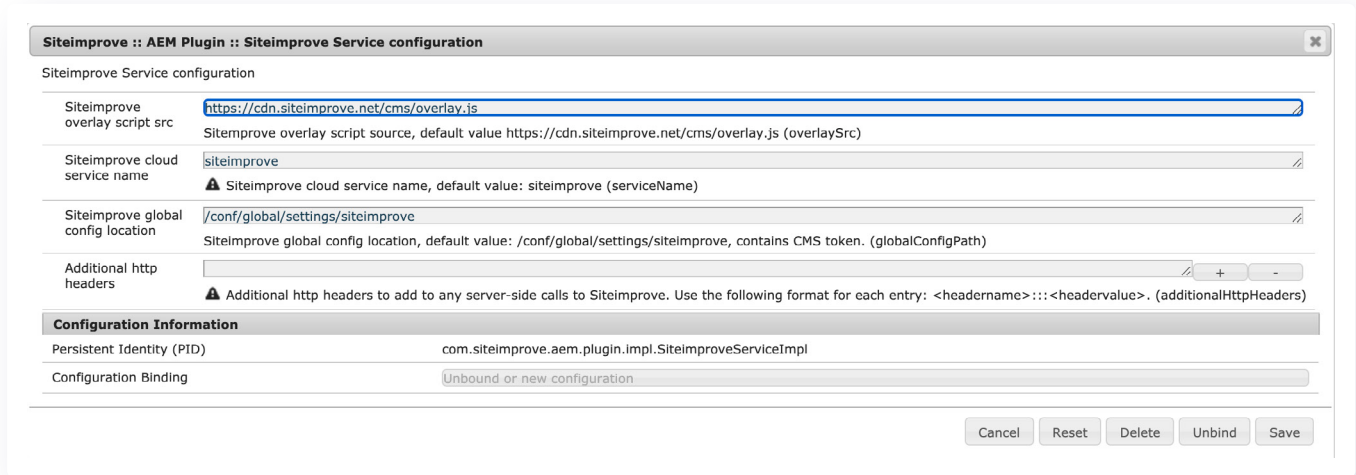
/apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/siteimprovePlugin

/apps/wcm/core/content/editor/jcr:content/content/items/content/content/items/siteimprovecontentcheckresult

/apps/wcm/core/content/sites/jcr:content/actions/selection/unpublishCheck

OSGi Plugin configuration

You can configure custom http headers to be added to every server-side call to the Siteimprove servers via the OSGi Configuration "Siteimprove :: AEM Plugin :: Siteimprove Service configuration". Headers should be entered in the format <header name>:::<header value>.



The screenshot shows the OSGi Configuration console for the "Siteimprove :: AEM Plugin :: Siteimprove Service configuration". The configuration is titled "Siteimprove Service configuration".

Fields and values:

- Siteimprove overlay script src: <https://cdn.siteimprove.net/cms/overlay.js>
- Siteimprove cloud service name: siteimprove
- Siteimprove global config location: /conf/global/settings/siteimprove
- Additional http headers: (empty)

Configuration Information:

Persistent Identity (PID)	com.siteimprove.aem.plugin.impl.SiteimproveServiceImpl
Configuration Binding	Unbound or new configuration

Buttons: Cancel, Reset, Delete, Unbind, Save

Plugin configuration

For configuring the plugin go to the Cloud Services (<http://localhost:4502/libs/cq/core/content/tools/cloudservices.html>) page and add a new Siteimprove Configuration by clicking on **Available Configurations** and then **the plus sign**.



Siteimprove Configurations

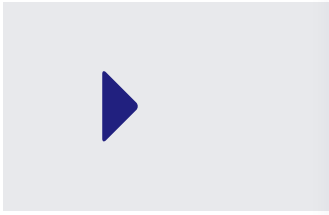
The Siteimprove CMS plugin bridges the gap between AEM and the Siteimprove Intelligence Platform. Now you can scan your website for errors as soon as a page is published, allowing you to fix mistakes, optimize content, and manage your site more efficiently.

[Show Configurations](#)

Available Configurations [+]

- <https://siteimprove.valtech.io> (Siteimprove Configuration)

Creating a new configuration for a website:




Create Configuration

Parent Configuration*

Title*

Name



Siteimprove Configuration
The Siteimprove CMS plugin bridges the gap between AEM and the Siteimprove Intelligence Platform. Now you can scan your website for errors as soon as a page is published, allowing you to fix mistakes, optimize content, and manage your site more efficiently.

Siteimprove Config

General Config | Plugin active paths | Pre-publish Check Config

External Domain with protocol

The external domain of your website

Page extension

The extension your pages use on the public website, e.g. .html, can be empty

Path shortening rules

Cut from Path

Prefix to cut

Enter the prefix to cut from content paths

Cut from Path (Regex)

Regular Expression and replacement

Enter the regular expression separated by @ for the replacement, e.g. /content/website/(de|fr|it)([^\s/]+)(.*)?/@/\$1\$2

Custom external path configuration

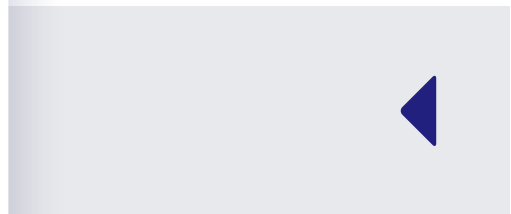
Custom path property

Enter a custom property on or below the cq:Page to be used for building the external path. This path will not be shortened by any rules configured below. If this is a multi-valued property the first non-empty String will be used.

Use configured extension for custom path

If enabled the extension will be added to your custom path, otherwise not.

Configure the new cloud service configuration:



Enter the following configuration items:

- **External Domain**, e.g. `https://www.mywebsite.com`
- **Page extension used** (if different than `.html`)
For example when using extensionless URLs you need to remove `'html'`
- **Cut from path for path shortening**
Imagine the following content path on the AEM author instance:

```
/content/www-mywebsite-com/home  
If this page is served over https://www.mywebsite.com as the root page you enter  
/content/www-mywebsite-com/home  
in one shortening entry. That means that the plugin will show the information on  
http://localhost:4502/editor.html/content/www-mywebsite-com/home/some-  
subpage.html  
for the external website
```

- **Cut from path with regular expressions**
You can also enter regular expressions for transforming the author path to the external path used on your website.
The format used is `<regular expression>@<replacement>`

Example:

```
(/content/we-retail/us/en)(/about-us)@$2
```

This will transform the page path on author
`/content/we-retail/us/en/about-us`
to the external path
`/about-us`

Be aware that the regular expressions are executed after the basic path cutting. In case you already shorten

```
/content/we-retail
```

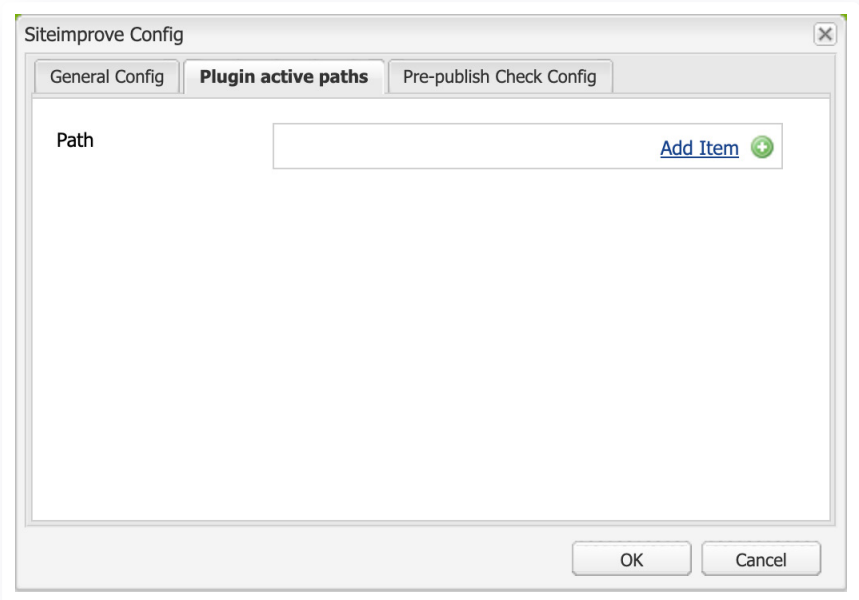
The regular expression should not include `/content/we-retail` but start with `/us/en` instead.

Regular expressions replacements are executed in the order they are defined in the multifield to allow sophisticated rewrite scenarios.

- **Custom external path property**
If you are using a custom property to specify the external path of a page, e.g. `slings:vanityUrl` you can enter this property here.
If the property is set it will be used for determining the external url of your page.
If this property is a multi-valued one we only take the first non-empty entry into consideration.
If the property value is not existing the plugin will fall back to the normal behaviour.

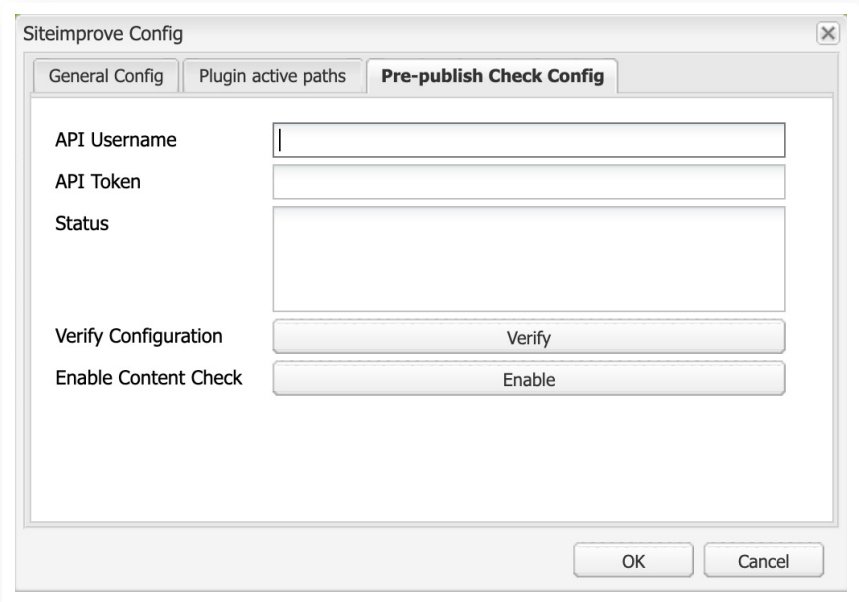
- **Active paths configuration**

You can configure the applicable paths for the plugin here instead of attaching the cloud configuration to your pages. This can be useful when you are using MSM and do not want to break inheritance for changing the cloud service configurations.



Configure the Pre-publish Check authentication:

1. Enter your **API username** and **API token** into the form.
2. In order to use the content check functionality you need to click the **Enable button**. This will trigger all necessary setup on Siteimprove that allows you to use the content check functionality.
3. Afterwards press the **Verify button** to check if you entered everything correctly.

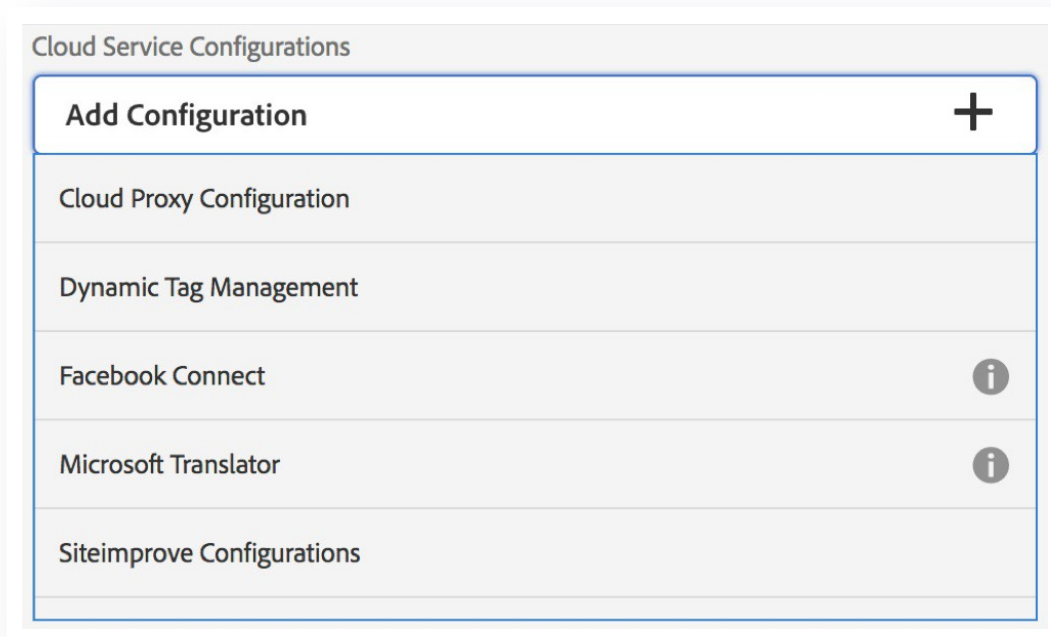


Plugin usage

The plugin can be used in different ways depending on the AEM implementation. In order to have context sensitive information available you need to add the cloud service configuration to the applicable page properties or use the Active paths configuration.

● Cloud Configuration

Go to page properties, select the **Cloud Services Tab** and click on **Add Configuration**.
Select **Siteimprove Configurations**.



Select **your created configuration** and click on **Save**.

Whenever you open a page in /cf# or /editor.html the context sensitive information is fetched and displayed if available.



● User permissions

In order to see the plugin a user has to be a member of the **'siteimprove-users'** group. Group memberships can be assigned in User admin (<http://localhost:4502/useradmin>) or in Group admin ([http://localhost:4502/libs/granite/security/content/groupEditor.html/home/groups/s/siteimprov users](http://localhost:4502/libs/granite/security/content/groupEditor.html/home/groups/s/siteimprov%20users)).

The package includes a system user `siteimprove-service`. This user has privilege `jcr:read` on `'/'` and `jcr:write` on `/conf/global/settings/siteimprove`.

Technical details

● Affected repository paths

- /apps/siteimprove-packages
- /apps/siteimprove/plugin
- /apps/granite/ui/content/globalhead/siteimprove
- /apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/toggleContentCheck
- /apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/siteimprovePlugin
- /apps/wcm/core/content/editor/jcr:content/content/items/content/content/items/siteimprovecontentcheckresult
- /etc/cloudservices/siteimprove
- /conf/global/settings/siteimprove
- /conf/global/settings/workflow/models/siteimprove
- /var/workflow/models/siteimprove
- /home/users/system/siteimprove
- /home/groups/s/siteimprove
- /rep:policy

Removing old sample workflow locations, have been relocated

- /conf/global/settings/workflow/models/si-test
- /var/workflow/models/si-test
- /conf/global/settings/workflow/models/si-unpublishcheck
- /var/workflow/models/si-unpublishcheck

Limitations

The plugin overlay is only rendered in /editor.html and /cf# if there is a cloud configuration assigned to the current path or the current path matches the configured active paths.

Clientlib categories used

- siteimprove.aem
Included over /apps/siteimprove/plugin/ui/head/head.html which is included by /apps/granite/ui/content/globalhead/siteimprove globally for standard touch ui interfaces.
- cq.wcm.edit
Sidekick Siteimprove action additions.
- cq.authoring.editor.sites.page.hook
/editor.html Siteimprove menu additions.

Inclusion in editor.html

For making the plugin available in editor.html an addition to the headerbar in /apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/item has been created as including the overlay within the page will lead to issues with the AEM overlay used in edit mode.

Troubleshooting

● Installation:

When using the dispatcher module for your authoring instance please ensure to flush the following files after installation:

- No minification activated
 - /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.css
 - /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.js
- Minification activated
 - /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.min.css
 - /libs/cq/gui/components/authoring/editors/clientlibs/sites/page.min.js

● Problem: The Siteimprove overlay does not render in /sites.html

Ensure that your deployments do not overwrite the following customizations added by the plugin:

- /apps/granite/ui/content/globalhead/siteimprove

Please ensure that your user is a member of the siteimprove-users group.

The overlay will only render if the selected page or any of its parents has a Siteimprove cloud configuration attached.

● Problem: The Siteimprove overlay does not render in /editor.html or the pre-publish check button is missing

If you are using the dispatcher module on your authoring instance please ensure that you followed the installation instructions for flushing the dispatcher.

Ensure that your deployments do not overwrite the following customizations added by the plugin:

- /apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/toggleContentCheck
- /apps/wcm/core/content/editor/jcr:content/content/items/content/header/items/headerbar/items/siteimprovePlugin
- /apps/wcm/core/content/editor/jcr:content/content/items/content/content/items/siteimprovecontentcheckresult

The overlay will only render if the selected page or any of its parents has a Siteimprove cloud configuration attached.