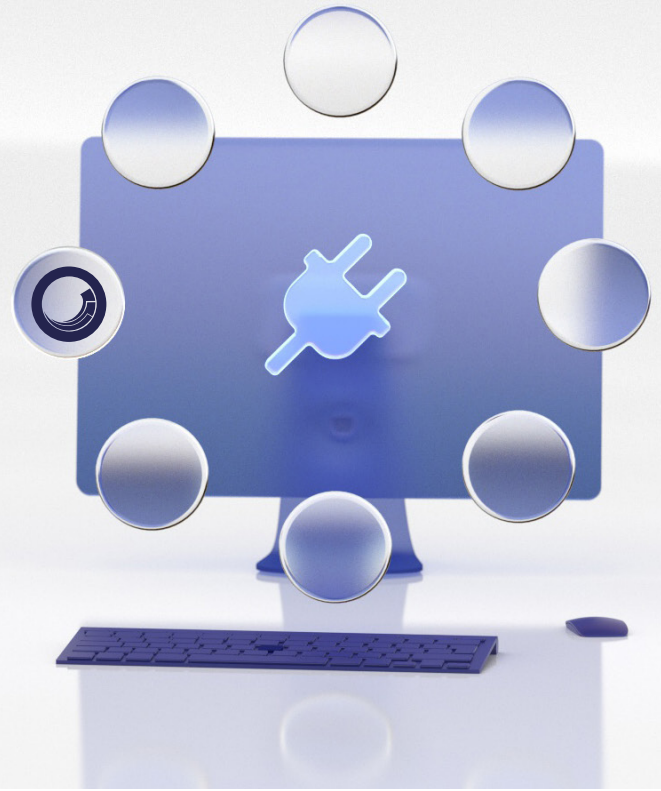


# Siteimprove CMS Plugin



Siteimprove  
Sitecore Module  
1.3.1



## Objectives

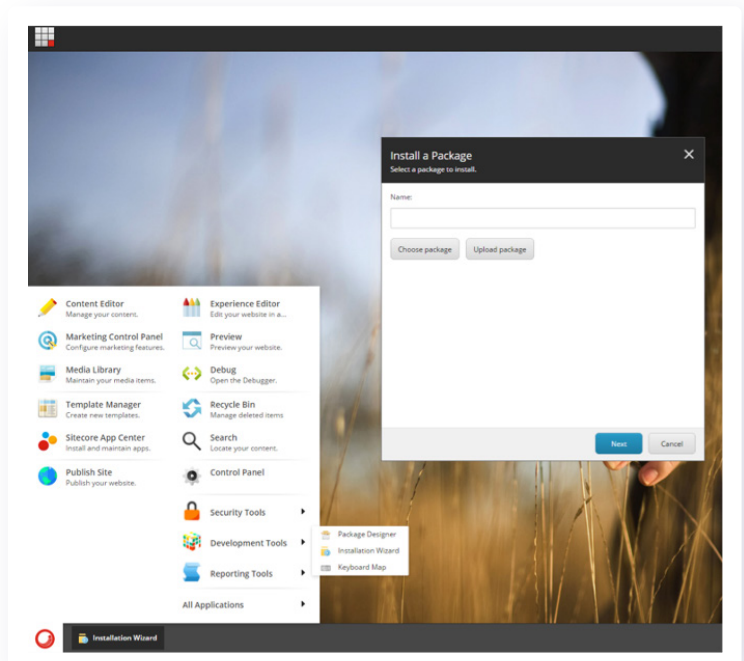
This document describes how to install and configure Siteimprove Sitecore Module. This module will allow existing customers to leverage Siteimprove tools directly within Sitecore.

## Compatible Sitecore versions

The module has been tested on Sitecore 9.0.2 to Sitecore 10.0.1 and is expected to work for all versions in between.

**PREREQUISITE** .NET Framework 4.7.2

1. Download Siteimprove Sitecore Module from <https://siteimprove.com/product/cms-plugin>
2. Backup your Sitecore instance (files and databases)
3. Install the module with Sitecore installation wizard
4. Verify the installation



## Role based access

The new version of Siteimprove plugin comes with a new Sitecore role that is installed automatically as part of the plugin package.

The role name is "**Sitecore\Siteimprove Manager**".

The role can be found under Sitecore Role Manager.

Going forward, any Sitecore user who is NOT part of this new role, will:

- Not have access to the **SITEIMPROVE** tab in Sitecore ribbon



- Not have access to the **SITEIMPROVE** overlay button.



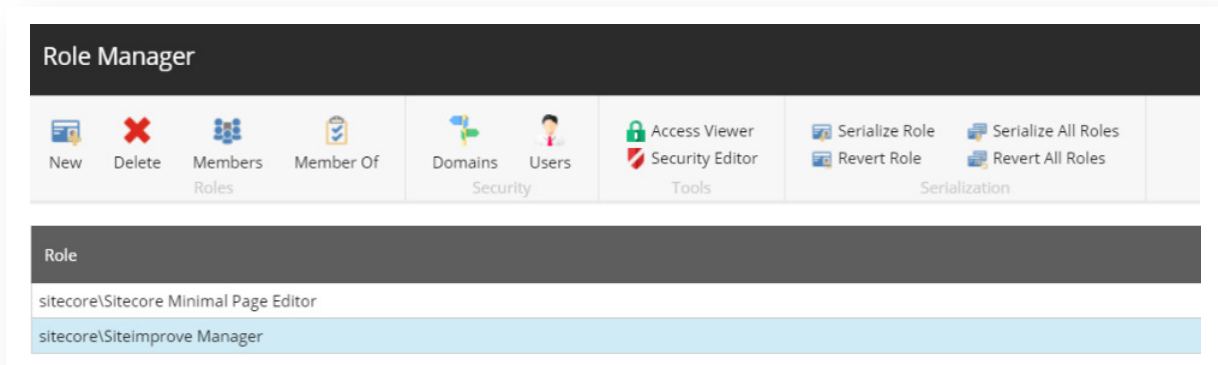
- Not have access to the Siteimprove settings item under: **/sitecore/system/Modules/Siteimprove/Siteimprove setting**

## Steps to add access

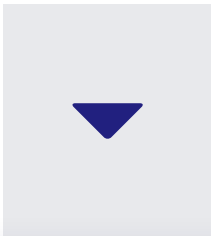
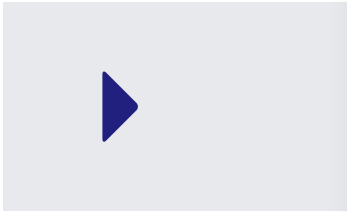
Sitecore Local Administrators will have full access to all the above features by default.

Any user who needs permission to access the Siteimprove plugin, need to be added to the "**sitecore/Siteimprove Manager**" role by using Sitecore role manager. The steps are as follows:

1. Open Sitecore Role Manager and select the **Siteimprove Manager role**.



2. Click on **Members** button in the ribbon.



Domain	Local name	Full name	Comment
sitecore	sitecore/Sitecore Local Administrators	sitecore/Sitecore Local Administrators	Role
sitecore	sitecore/Sitecore Limited Content Editor	sitecore/Sitecore Limited Content Editor	Role

3. Click on **Add** button to get the list of Users and Roles.

- Use search field to search for the user account or role that need to added to this role.
- As a part of Sitecore's default behavior, a role can be added to another role. Add any existing role to Siteimprove Manager role to give access to all the users that are part of the existing role.

Account Type

Roles

Users

Search

Role

- sitecore/Analytics Advanced Testing
- sitecore/Analytics Content Profiling
- sitecore/Analytics Maintaining
- sitecore/Analytics Management Reporting
- sitecore/Analytics Personalization
- sitecore/Analytics Reporting
- sitecore/Analytics Testing
- sitecore/Author
- sitecore/Designer
- sitecore/Developer
- sitecore/EXM Advanced Users
- sitecore/EXM Users
- sitecore/Forms Editor
- sitecore/List Manager Editors
- sitecore/Marketing Automation Editors

OK Cancel

## Purpose

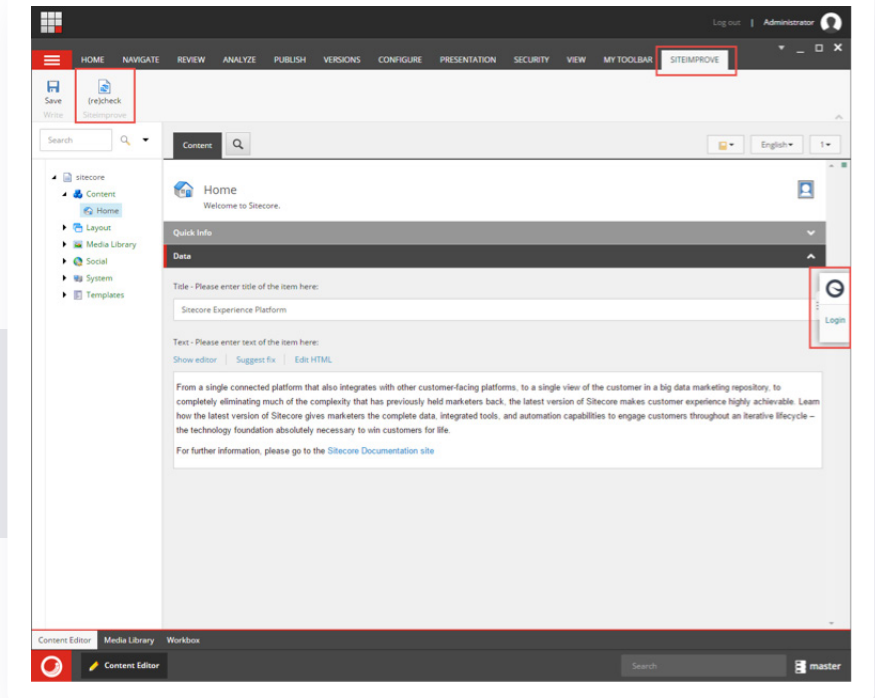
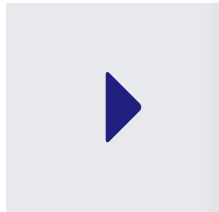
Only user(s) or group of users with relevant purpose, should be able to interact with the plug-in.

## Verify the installation

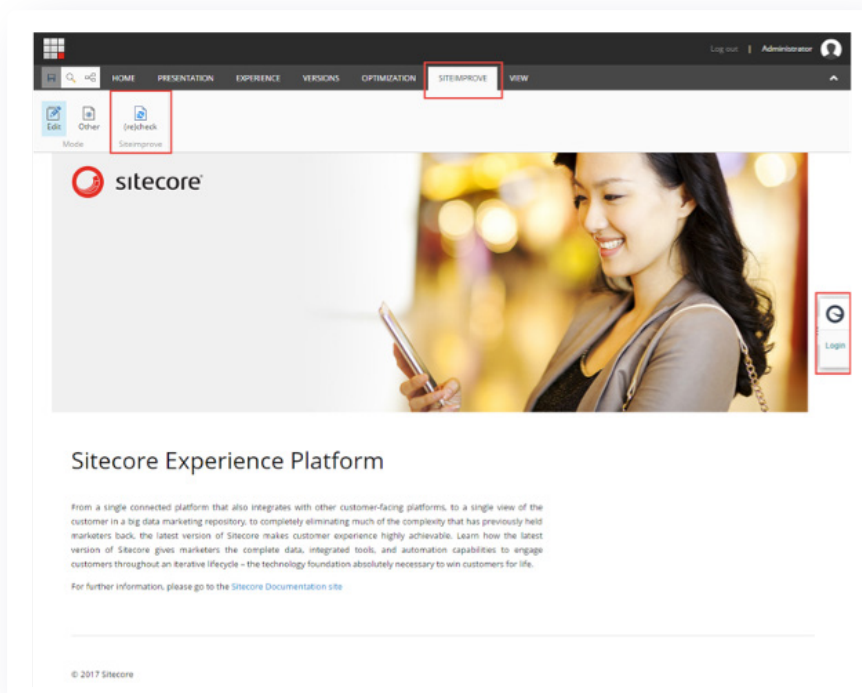
Login to both Content Editor and Experience Editor and verify that Siteimprove has been installed correct. Both interfaces will now have an overlay box, which default will float to the right – and – a new "Siteimprove" tab and command in the ribbon.

## Content Editor

Siteimprove will only be enabled on items with layout assigned.



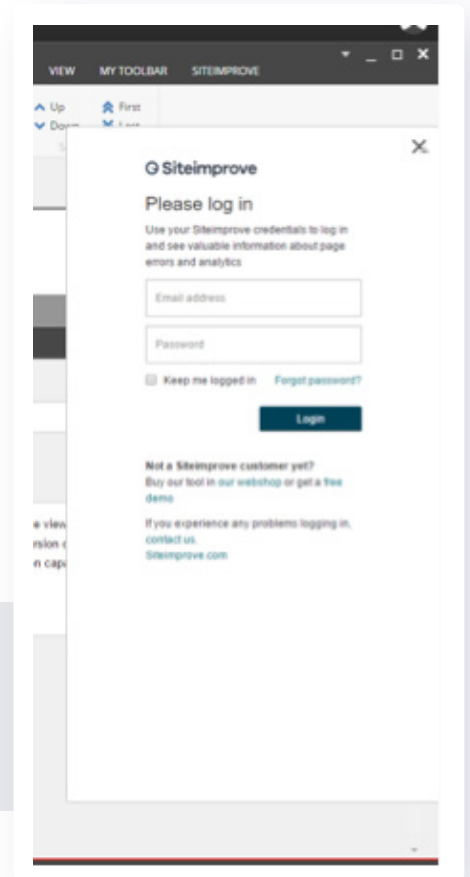
## Experience Editor



## Commands

The overlay box will allow a user to login to Siteimprove with username and password. When a user is logged in, different tools and reports are available for the selected published Item. If the item has not been published yet, please publish the item and click (re)check command in the ribbon.

The (re)check command will allow customers to recrawl and update the Siteimprove report for the selected item. Remember to publish the selected item before invoking the (re)check command.



## Site settings

Siteimprove is a crawler that needs http(s) access to crawl. The crawler will analyze the page and generate a report – to be able to crawl the site, the module will need to have the live url for the page.

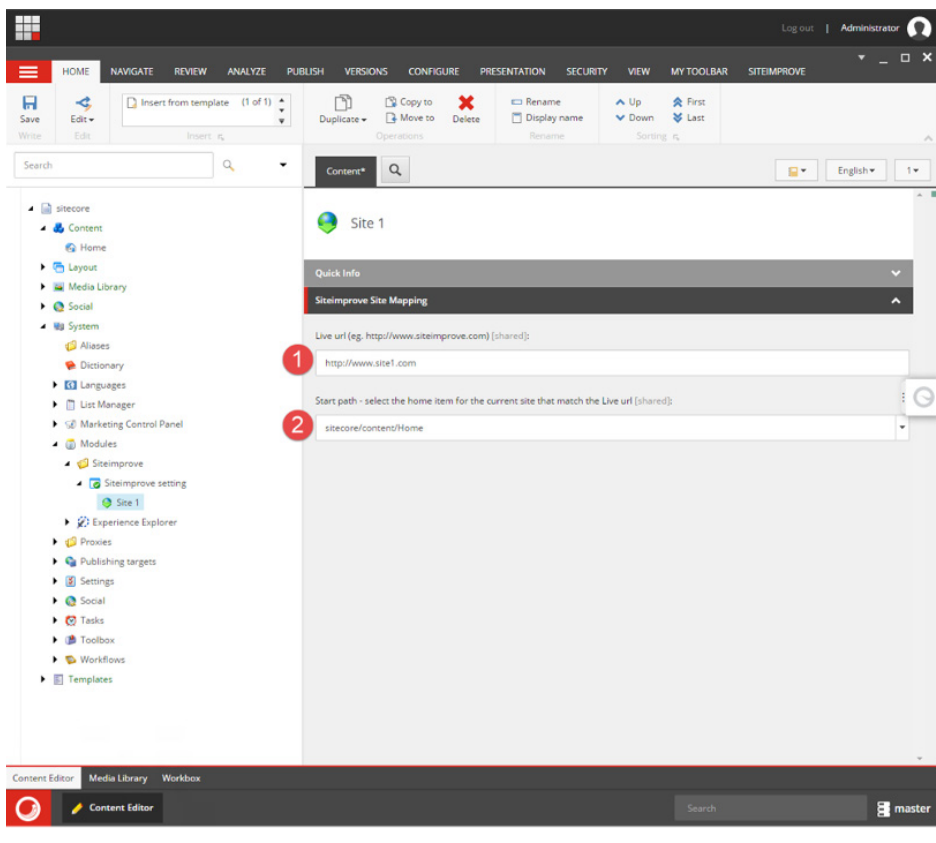
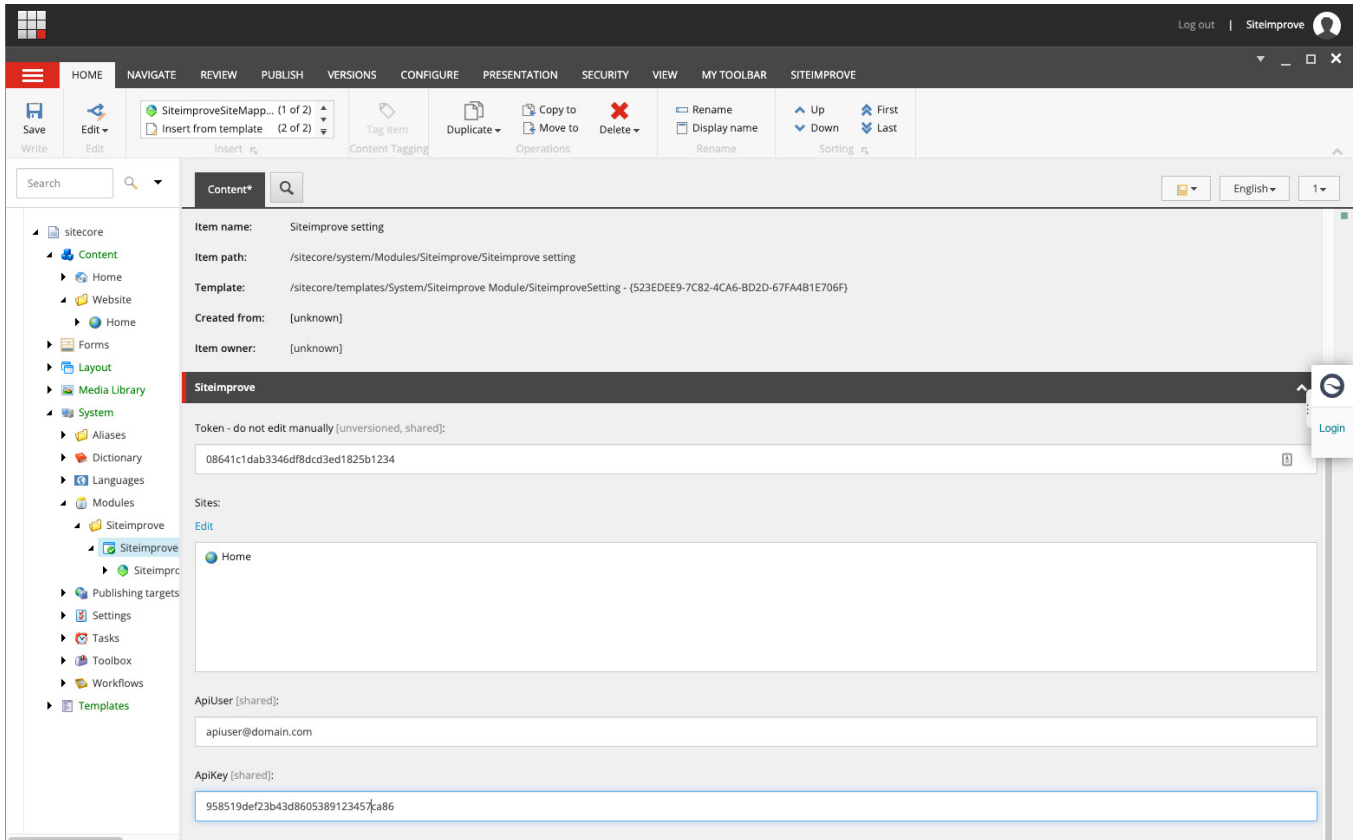
Some Sitecore installations have separate domains for CM environment and CD environment or have multiple sites within one Sitecore instance – hence multiple domains. The module will need know what the live domain is, to be able to generate live-URLs.

The module installs a settings item located in the Modules folder: **`/sitecore/system/Modules/Siteimprove/Siteimprove setting/`**

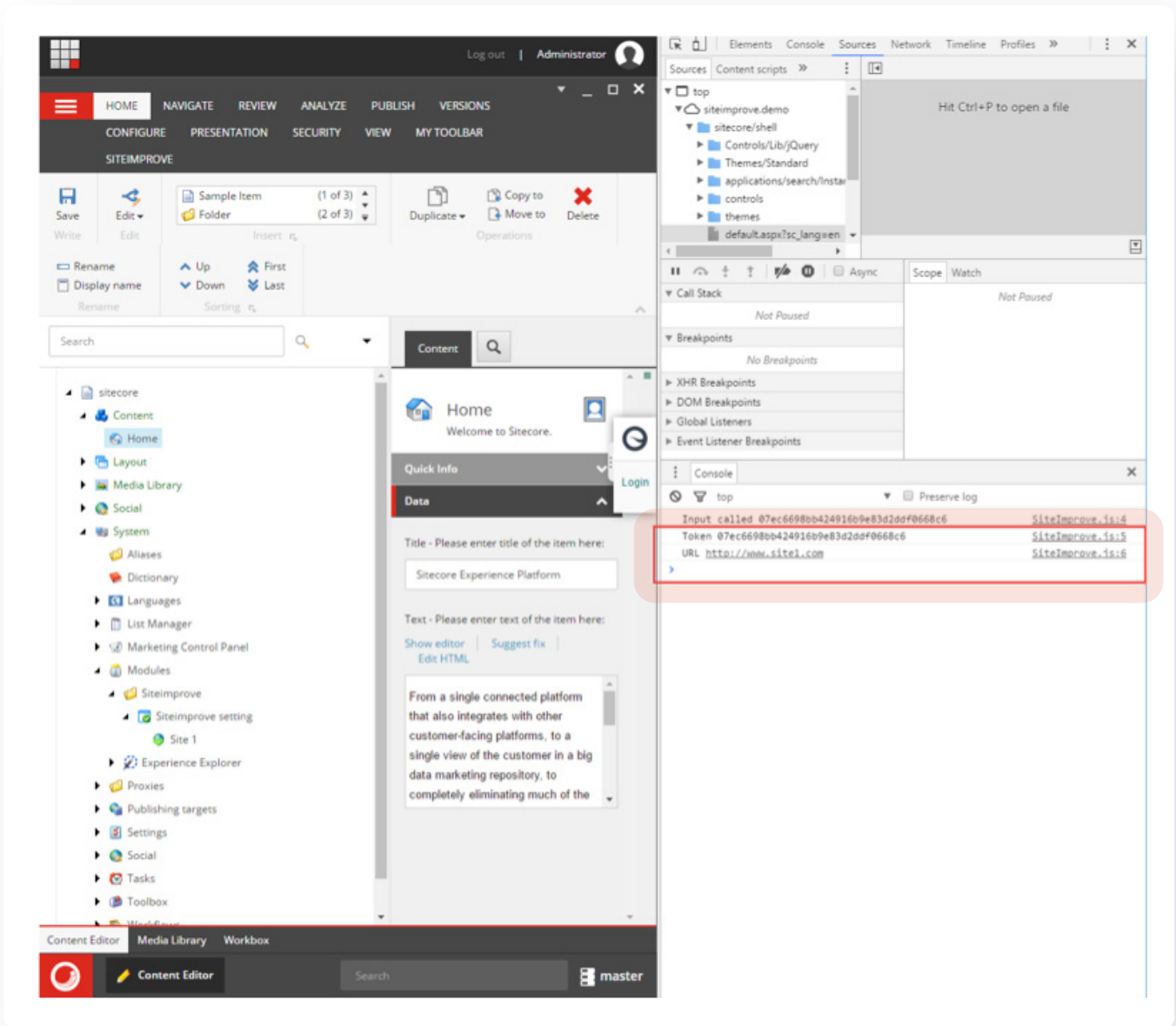
The “Siteimprove setting” item contains a field “Sites” in which you can select the Site root items from the content tree specifying which sites belongs to this “Siteimprove setting” item. Furthermore, it is possible to insert “SiteimproveSiteMapping” item as child items. This will allow you to add one “SiteimproveSiteMapping” item per site/ domain combination.

There can be defined multiple “Siteimprove setting” items. If a given site is not mapped to any of the “Siteimprove setting” items, the default item as specified in the siteimprove.config file will be used as fallback.

## The SiteimproveSiteMapping item requires two fields.



1. The domain
2. The start item.



To verify that the module is using the correct site setting item, the browser console will print what is sent to Siteimprove, including the url for the item.



## Architecture

Siteimprove's Sitecore module leverages Sitecores pipelines for easy customization and extension.

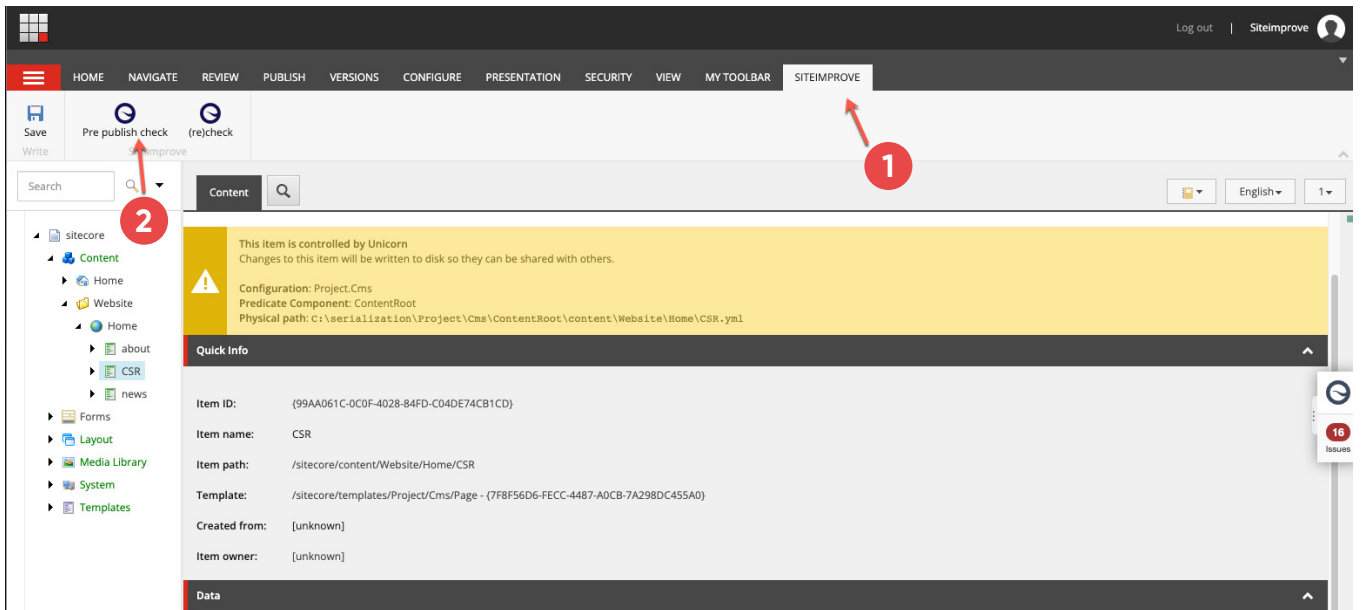
## Enabling Pre publish check

Add a Siteimprove API user and the corresponding API key in order to enable Pre Publish checks of pages.

Find out more on how to add an API user and an API key in the [Help Center](#).

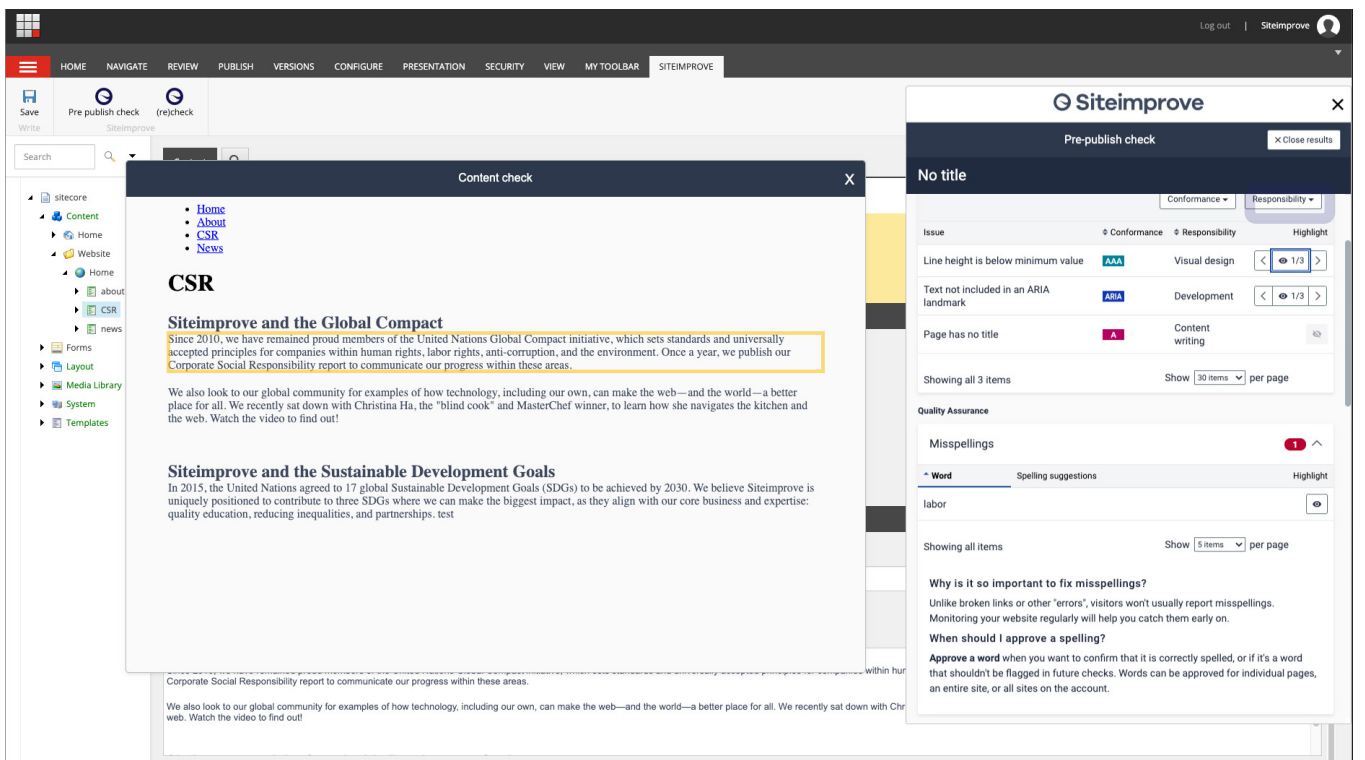
## Using the Pre-publish feature

In order to check a page before publishing, please use the Siteimprove menu item **1** in Sitecore and choose the option Pre publish check **2**.



This will initiate the check and open a preview of the page, as it will look when published.

When the checks have been run, you the plugin will have the information and the items can be highlighted in the preview window.



## Content Security Policy

Due to the introduction of a preconfigured Content Security Policy from **Sitecore 9.3** it is required to ensure that Siteimprove scripts are allowed to execute. Since the CSP of your specific solution may differ from the default and it is a web.config setting the module is not manipulating the setting in any way by itself.

The following can be added to the CSP custom header in order to enable the module:

```
script-src 'self' 'unsafe-eval' 'unsafe-inline' https://cdn.siteimprove.net/
```

In a config transformation file it could look like this (based on the default value of the setting in a clean **Sitecore 9.3** installation):

```
<location path="sitecore">
  <system.webServer>
    <httpProtocol>
      <customHeaders>
        <add name="Content-Security-Policy" value="default-src
          'self' 'unsafe-inline' 'unsafe-eval'
          https://apps.sitecore.net; img-src 'self' data;; style-src 'self'
          'unsafe-inline' https://fonts.googleapis.com; font-src 'self'
          'unsafeinline' https://fonts.gstatic.com; script-src 'self'
          'unsafe-eval'
          'unsafe-inline' https://cdn.siteimprove.net/"
          xdt:Locator="Match(name)" xdt:Transform="Replace"/>
      </customHeaders>
    </httpProtocol>
  </system.webServer>
</location>
```

If you want to remove the CSP entirely for instance in the local environment you can apply the following transformation instead:

```
<location path="sitecore">
  <system.webServer>
    <httpProtocol>
      <customHeaders>
        <add name="Content-Security-Policy" xdt:Locator="Match(name)"
          xdt:Transform="Remove"/>
      </customHeaders>
    </httpProtocol>
  </system.webServer>
</location>
```

When installing the Siteimprove plugin to **Sitecore 10** and later please add the following to the Content Security Policy.

In a config transformation file it could look like this (based on the default value of the setting in a clean **Sitecore 10** installation):

```
<location path="sitecore">
  <system.webServer>
    <httpProtocol>
      <customHeaders>
        <add name="Content-Security-Policy" value="default-src 'self'
          'unsafe-inline' 'unsafe-eval'; img-src 'self' data:; style-src
          'self' 'unsafe-inline' https://fonts.googleapis.com; font-src
          'self' 'unsafe-inline' https://fonts.gstatic.com; script-src 'self'
          'unsafe-eval' 'unsafe-inline' https://cdn.siteimprove.net/; connect-
          src 'self' 'unsafe-eval' 'unsafe-inline' https://*.siteimprove.
          com/; frame-src 'self' 'unsafe-eval' 'unsafe-inline' https://*.
          siteimprove.com/; upgrade-insecure-requests; block-all-mixed-
          content;" xdt:Locator="Match(name)" xdt:Transform="Replace" />
      </customHeaders>
    </httpProtocol>
  </system.webServer>
</location>
```

More information on CSP can be found for instance on <https://developer.chrome.com/extensions/contentSecurityPolicy>



[Request a demo](#)

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 **Siteimprove**

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