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Sitecore Connect™ for Sitecore DAM™

A guide to configuring and using Sitecore Connect™ for Sitecore DAM™

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Chapter 1

Sitecore Connect™ for Sitecore DAM™

The main goal of the Sitecore Connect™ for Sitecore DAM™ is to enable Sitecore users to browse, search and insert digital assets from Sitecore DAM™ directly within Sitecore's Content and Experience editing.

Note

This Sitecore Connect™ for Sitecore ™ has been tested on Sitecore Experience Manager and Sitecore Experience Platform (versions 9.1.0, 9.1.1, 9.2.0 and 9.3.0), as well as Sitecore Experience Commerce (versions 9.1.0, 9.1.1, 9.2.0 and 9.3.0).

The **Sitecore Connect™ for Sitecore DAM™** is entirely localizable (only English resources are provided out-of-the-box).

This **Sitecore Connect™ for Sitecore DAM™** is compatible with the SXA 1.9 rev. 190506 for 9.1.1 onwards.

The Sitecore Connect™ for Sitecore DAM™ requires a configuration in both Sitecore DAM™ and Sitecore instances, as detailed in the following chapters.
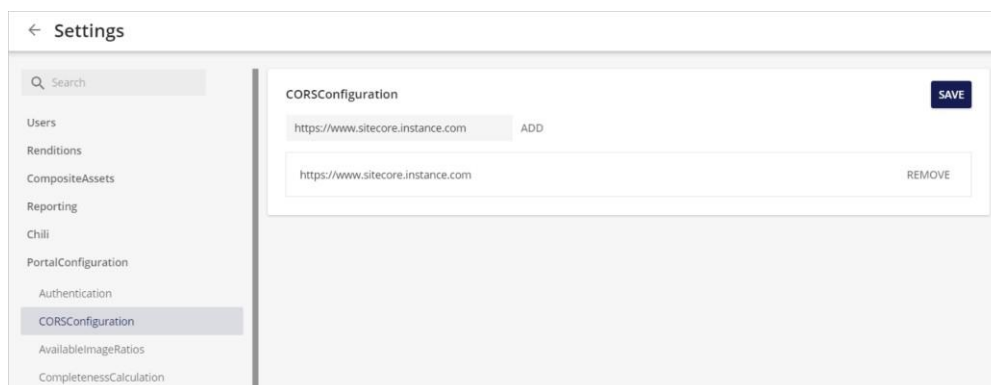
1.1 Sitecore DAM™ configuration

This configuration is to be applied on a 3.3.x version of Sitecore DAM™. It is preferable to use the latest 3.3.x version.

1.1.1   CORS configuration

The CORS for Sitecore DAM™ needs to be configured to allow incoming traffic from the Sitecore instance:

1. Go to **Manage** (Main menu item).

2. Click on the **Settings** item.

3. On the Settings page, click on the **PortalConfiguration** menu item.

4. Click on **CORSConfiguration** under the **PortalConfiguration** menu item.

5. Add the Sitecore instance URL to the list of URLs (e.g. `https://www.sitecore.instance.com`).
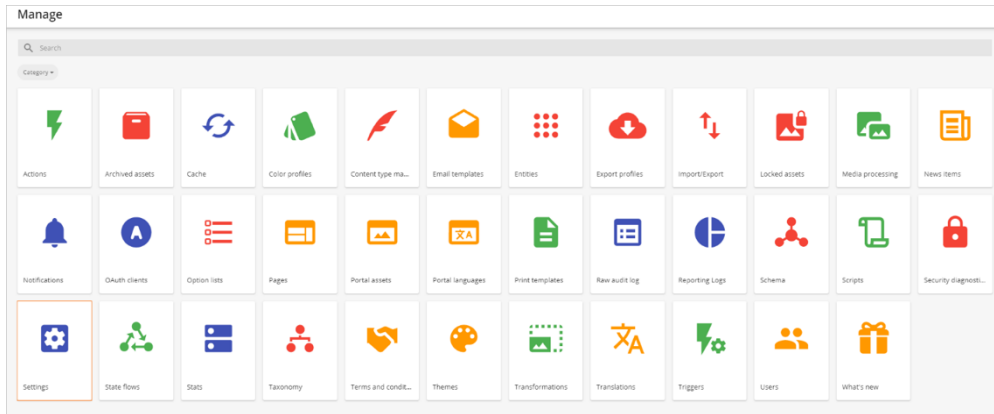
6. Save the changes.
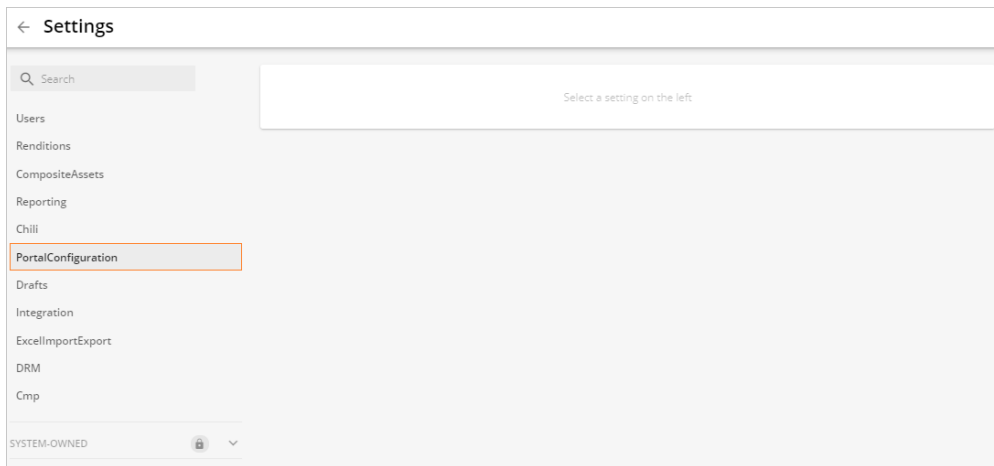

1.1.2   Portal configuration

The redirection setting needs to be configured within the **PortalConfiguration** of Sitecore DAM™ to allow the Sitecore instance to access/display the Sitecore DAM™.

1. Go to **Manage** (Main menu item).

2. Click on the **Settings** item.

3. On the **Settings** page, click on the **PortalConfiguration** menu item.

4. Click on the **Authentication** under the **PortalConfiguration** menu item.

5. In the menu options in the dropdown list, select **Text**.

6. Under **Providers**, change all SSO providers' authentication mode to "Passive":

```
"sitecore": [
    {
        "authentication_mode": "Passive",
        "client_id": "<ClientId>",
        "client_secret": "<ClientSecret>",
        "email_claim_type": "<ClaimTypeOverride>",
        "external_user_creation_url": "https://www.registerme.com",
        "identity_server_url": "<Url>",
        "is_enabled": true,
        "messages": {
          "signIn": "T_translationKey",
          "signInDescription": "T_translationKey",
          "signInTitle": "T_translationKey"
        },
        "provider_name": "Sitecore,",
        "username_claim_type": "<ClaimTypeOverride>"
    }
  ]
```

Note:
If you do not have SSO configured, basic authentication is used, and you can skip
this step as the authentication mode is set to "Passive" by default in that case.

1.2 Sitecore configuration

The following configuration must be applied on a 9.1.0, 9.1.1, 9.2.0 or 9.3.0 version instance of Sitecore.
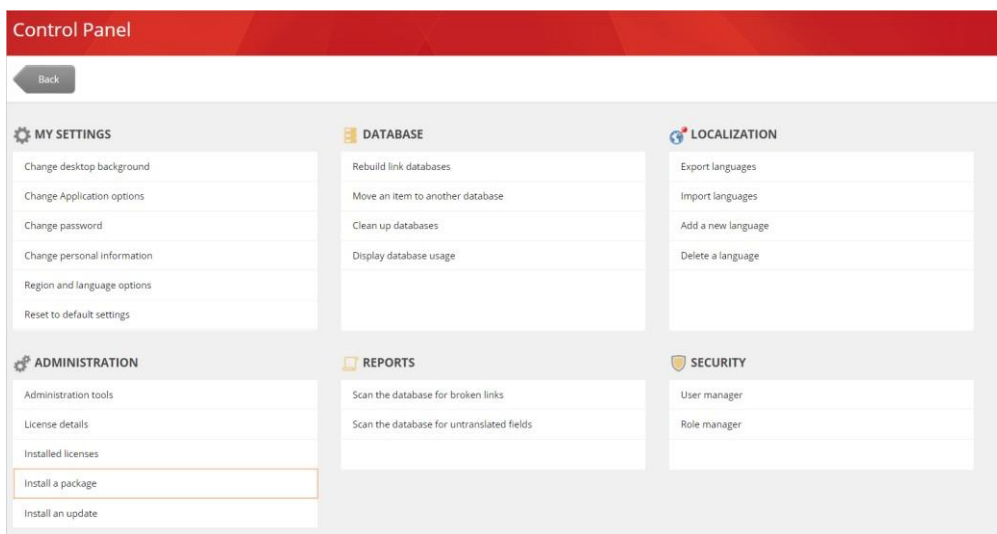
1.2.1 Package installation

The Sitecore Connect™ for Sitecore DAM™ package needs to be installed in the Sitecore instance. In a scaled setup (multiple Sitecore instances), the user needs to copy files from the Sitecore DAM™ installation package to all the Sitecore instances in the environment. This package can be retrieved from https://dev.sitecore.net/.
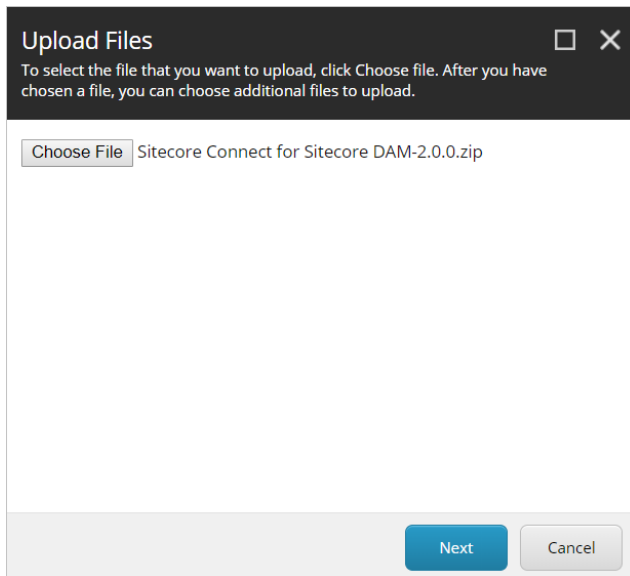
1. Log into the Sitecore instance by navigating to the corresponding URL (e.g. https://www.Sitecore.Instance.com).

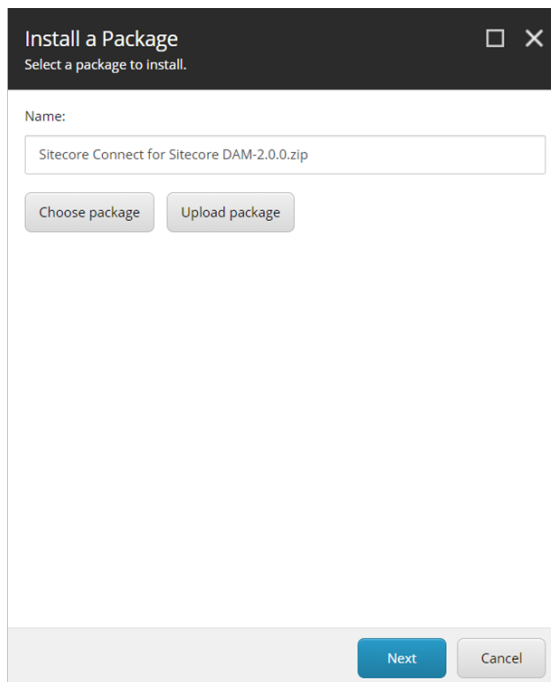2. On the Launchpad, click **Control Panel**.
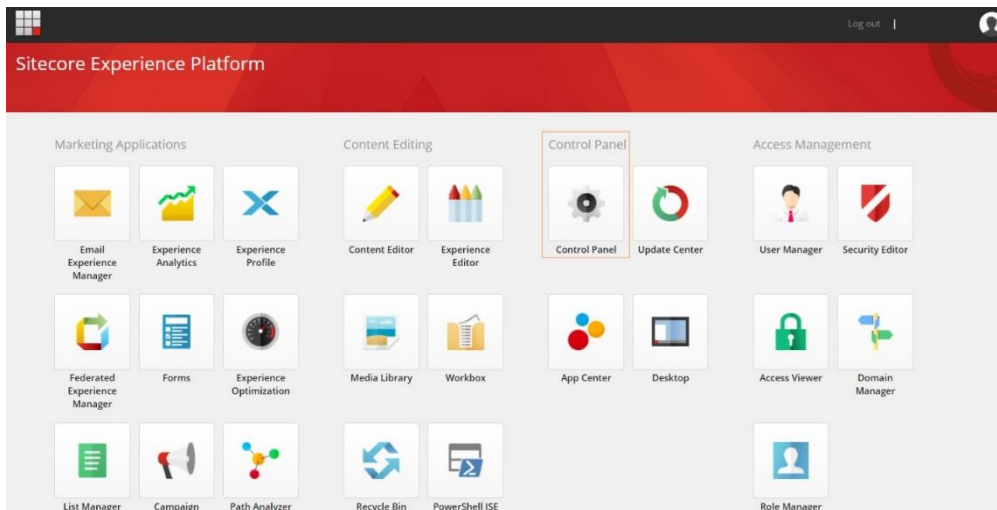
3. In the **Administration** section, click **Install a Package**.

4. In the **Upload Files** dialog, select the **Sitecore Connect™ for Sitecore DAM™** zip package.

5. In the **Install a Package** dialog, select the **Sitecore Connect™ for Sitecore DAM™** package then click **Next**.

6. Verify the package information then click **Install**.

7. When prompted with the following message:
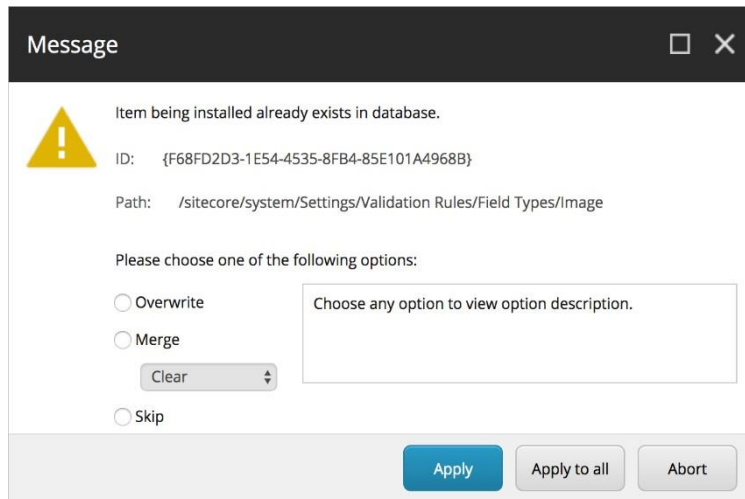
Select **Overwrite** to replace the existing item with the new item from the package. If you want to keep the existing item, back it up before proceeding with the installation.

8. When the packet has been installed, the wizard displays a list of check boxes - **Restart the Sitecore Client** (ticked by default) and **Restart the Sitecore Server**.
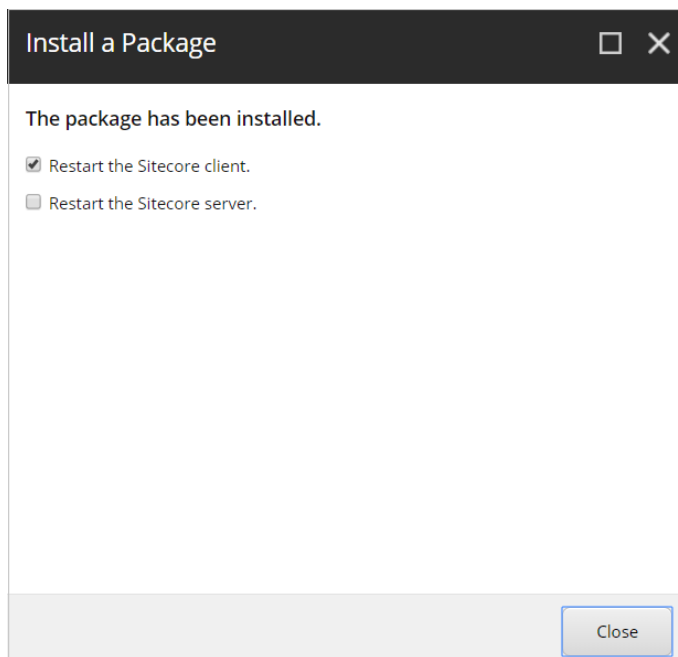
1.2.2   Package configuration

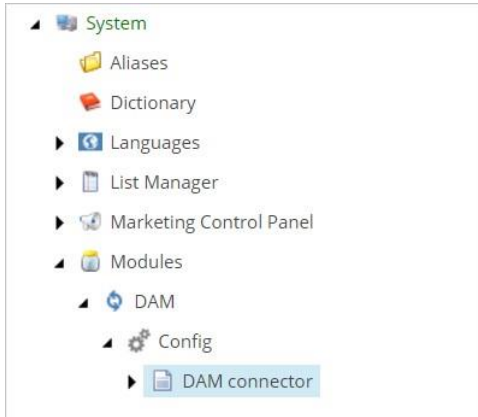After the package is successfully installed, the Sitecore Connect™ for Sitecore DAM™ needs to be configured by completing the following steps and supplying the required information.
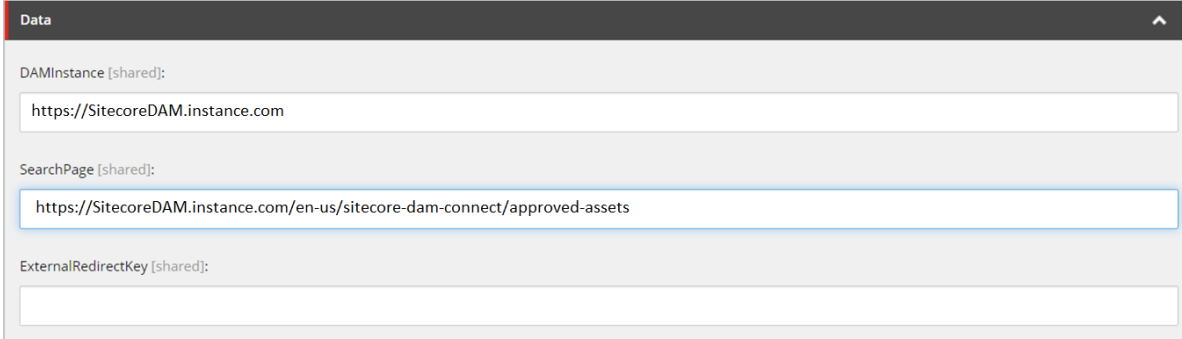
1.   In the **Content Editor**, in the content tree, go to **Sitecore** > **System** > **Modules**.

2.   Open the **DAM** folder. Proceed to extend **Config** and go to **DAM connector**.

1.   In the **Data** section, fill in the Sitecore Connect™ for Sitecore DAM™ parameters with information about the **DAM Instance**.

> **Warning:**
>
> The URLs you enter must **not** have a "/" at the end.

> **Note**
>
> Starting from the version 3.2.1 of Sitecore DAM™, the URL of the connector pages has changed from "/en-us/sitecore-plugin/approved-assets" to "/en-us/sitecore-dam-connect/approved-assets".
>
> The user account using the connector needs to have 'read' access over the connector pages in Sitecore DAM™.

2.   Save the changes.

3. **If you are using version 9.3 or higher of Sitecore**, open the "web.config" file found in the root folder (wwwroot) and add the URL of the Content Hub instance (e.g. content-hub-url.stylelabs.com) and other delivery hostnames (e.g. content-hub-url-delivery.stylelabs.cloud) as sources to the "Content-Security-Policy" tag as follows:

```
<add name="Content-Security-Policy" value="default-src 'self' 'unsafe-inline' 'unsafe-eval' https://apps.sitecore.net; img-src 'self' data https://content-hub-url.stylelabs.com/ https://content-hub-url-delivery.stylelabs.cloud/; style-src 'self' 'unsafe-inline' https://fonts.googleapis.com; font-src 'self' 'unsafe-inline' https://fonts.gstatic.com; upgrade-insecure-requests; block-all-mixed-content; child-src 'self' https://content-hub-url.stylelabs.com/ https://content-hub-url-delivery.stylelabs.cloud/; connect-src 'self' https://content-hub-url.stylelabs.com/ https://content-hub-url-delivery.stylelabs.cloud/;"/>
```

Note:

In Content Hub, you can configure different delivery hostnames for public links via the `AssetExtensionDataConfigurationSetting` setting.

In this case, make sure to add any configured hostname as a source to the `img-src`, `child-src` and `connect-src` properties of the `Content-Security-Policy` parameter.

4. The Sitecore Connect™ for Sitecore DAM™ is now an available option in the Rich Text Editor via the **Insert from Sitecore DAM™** icon.
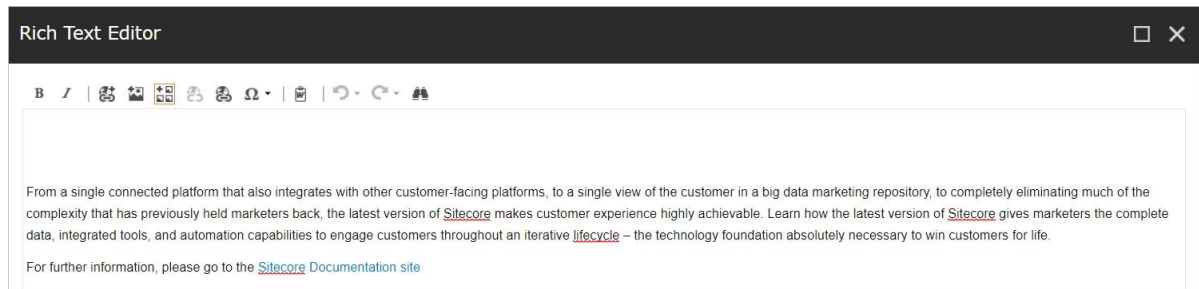
1.3 Overview

The Sitecore Connect™ for Sitecore DAM™ displays the assets in the Sitecore DAM™ through an IFrame. This IFrame opens via the **Insert from Sitecore DAM™** icon in the toolbar.

1. A popup window will open to log in to Sitecore DAM™.
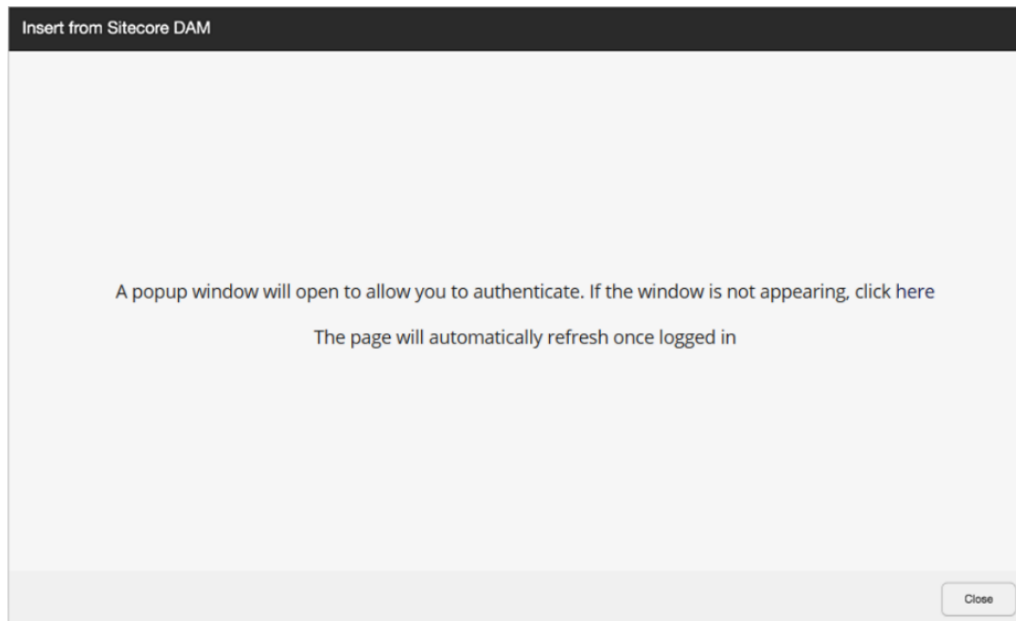
The Sitecore DAM™ assets are displayed in the search pages created in the Sitecore DAM™ platform. These pages are fully configurable by Sitecore DAM™ Superusers, with the possibility to include; filters, flyouts, quick edits, etc. A new page is displayed along with two child pages: **Pending approval** and **Approved asset**.

2. The **Approved assets** page displays all the published assets.
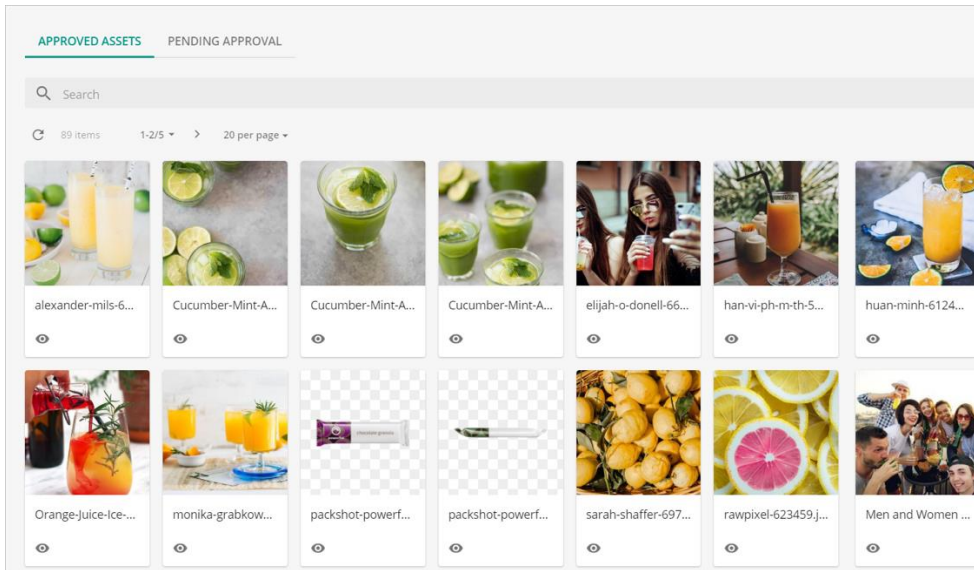
3. The **Pending approval** page displays assets from the **Create** and **Review** pages of the current user. The user can also upload files and create assets from this page.

1.4 Supported media types

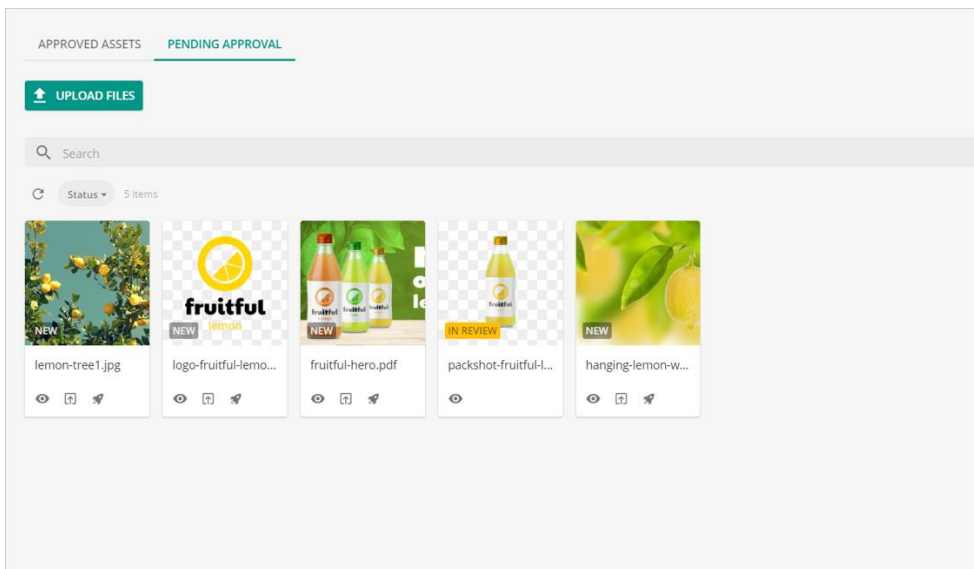The Sitecore Connect™ for Sitecore DAM™ supports various media types. Image assets and video assets will be inserted using the same asset type after the specified conversion. For other media types (e.g. documents), they will not be converted, however, the connector will display a download link for the asset.

Media types in Sitecore DAM	Inserted in Sitecore
Image	Image
Video	Video
Other media types	Download Link

1.5 Available operations

The assets in the **Approved assets** and **Pending approval** pages display clickable thumbnail images with indicators and action buttons:
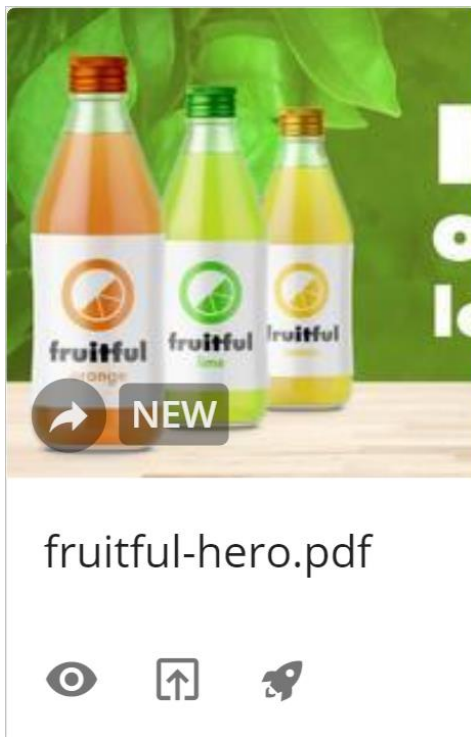
The available operations and indicators are:

- Clicking on the thumbnail image of the asset opens the **Choose file to insert** page where users can select a file to insert.

- ➤ : The public link indicator is shown on assets that already have one or more public links. This indicator is not clickable.

- 👁 : The preview button opens the **Preview** page displaying a preview with a brief summary of the metadata for the selected asset.

- ⬆ : The submit button submits publishes the assets uploaded from the **Pending approval** page to approval following the usual approval flow. The assets will be available for use in the **Approved assets** page after a reviewer approves them.

- 🚀 : The direct-publish button publishes the assets uploaded from the **Pending approval** page, making them immediately available for use in the **Approved assets** page. This operation is not available for all users as it requires additional permissions.

- IN REVIEW : The status indicator, in the **Pending approval** pages, shows the current status of the assets, among **Created**, **In review** and **Rejected**. The approved assets are available in the **Approved assets** page.

1.5.1   Choose file to insert

The **Choose file to insert** page can be accessed by clicking the asset's thumbnail image, or by clicking the **Choose file to insert** button in the asset's preview page. Users can insert the selected asset from this page by choosing an existing public link or by creating a new one.
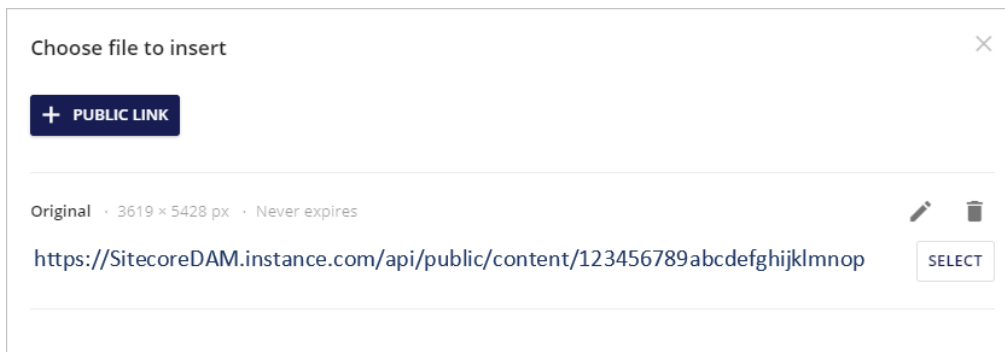
Note

Public links are used in Sitecore DAM™ to share the assets with external systems. When an asset has been inserted in Sitecore using public links, any subsequent change to that asset occurring within Sitecore DAM™ will be reflected on the asset in Sitecore, for the purposes of reusability.

The **Choose file to insert** page displays a list of the available public links for the selected asset. Each public link supplies the actual URL, as well as other parameters about the link (separated by an asterisk):

- The asset rendition (e.g. Preview).
- The cropping option (e.g. Cropped).
- The rendition dimensions (e.g. 300 x 295 px).
- The expiration date (e.g. Never expires).

The **Choose file to insert** page contains the following operations for each public link:

- ✏ : This button opens a new page where users can edit the corresponding public link.
- 🗑 : This button deletes the corresponding public link.
- **Select** : This option selects the corresponding public link to insert the asset in Sitecore.

Users can also create new public links by clicking the **New public link** button. This button opens the **New public link** page, where users can create new public links for the asset.

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1.5.2 New public link

To open the **New public link** page, click **New public link**. If no public link exists, a new public link window opens:
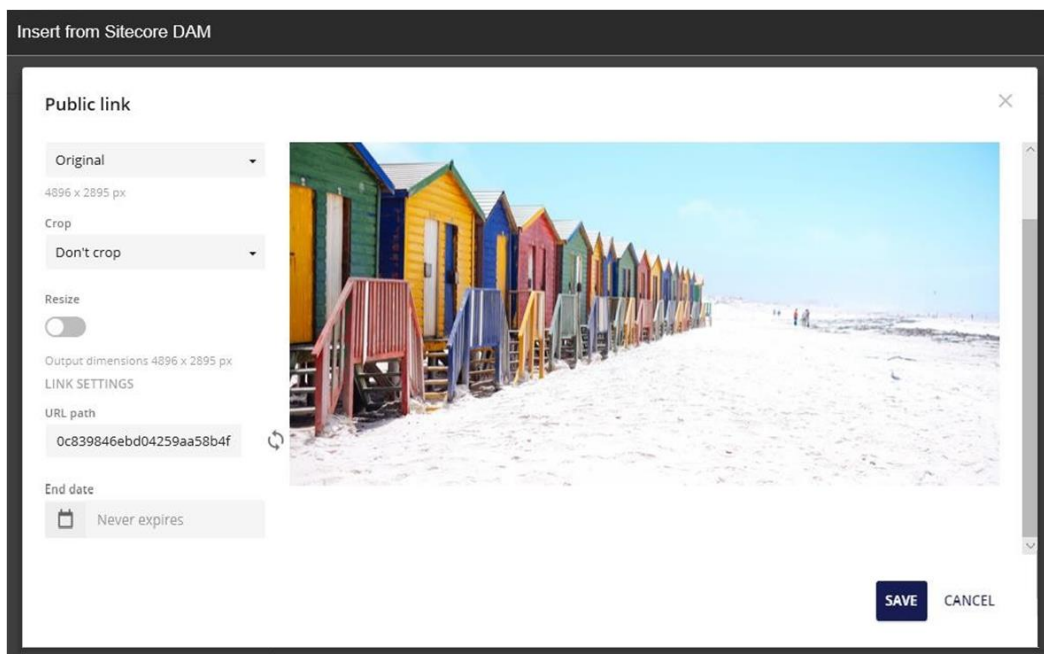
In the **New public link** page, users need to enter the following information:

Group	Property	Description
Image settings	**Rendition**	The type of Rendition is a mandatory field. Any common rendition of the selected assets can be chosen: Preview Thumbnail Original
	Crop	This parameter defines the cropping option: Don't crop Crop to center Smart crop Custom crop The cropping options are further explained in the Cropping Options section.

|			
	Aspect ratio	This option defines the ratio of the width to the height of the asset. This field is only available when the **Crop** option is set to **Custom crop**. The possible values include preset aspect ratios for Facebook, Instagram, LinkedIn, Twitter and YouTube. The Aspect ratio values are further detailed in the Cropping Options section.	
	Resize	The **Resize** option defines the height and weight of the asset. When activated, the **Height** and **Width** fields are displayed. This field is only available when the **Crop** option is set to **Don't crop** or to **Custom crop**.	
	Width	This option defines the width of the asset. This field is only available when the **Resize** option is activated or when the **Crop** option is set to **Crop to center** or to **Smart crop**.	
	Height	This option defines the height of the asset. This field is only available when the **Resize** option is activated or when the **Crop** option is set to **Crop to center** or to **Smart crop**.	
Link settings	**URL path**	The URL path is automatically generated for the new public link. Clicking on the refresh button regenerates a new URL path. Users can manually edit the URL path.	
	End date	Click on the calendar icon and select a date for the link to expire on. This field is optional. Selecting no value means the public link never expires.	

Cropping options

The new public link interface offers various cropping options. The following image provides an overview of the available options.
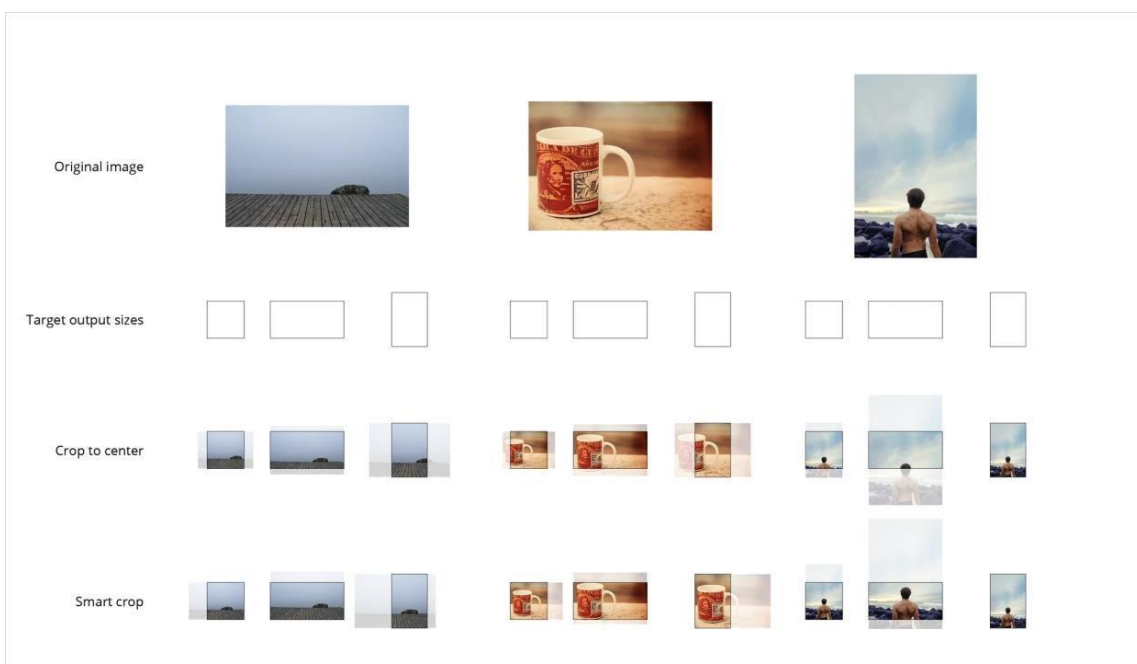
The cropping options are:

- **Don't crop**: This option keeps the selected rendition and doesn't crop the image.

- **Crop to center**: This option positions the crop box to the center of the image. The width and height values specify the dimensions of the crop box.

- **Smart crop**: This option searches the image for edges, skin tones and areas of saturated color, and attempts to position the crop box over the most significant feature. The width and height values specify the dimensions of the crop box.

- **Custom crop**: This option allows users to manually select the aspect ratio from a list of preset values. It also allows users to resize the image using the width and height values, and to manually adjust the cropping box in the preview panel. Clicking on this icon ⇥ reverses the cropping box dimensions.
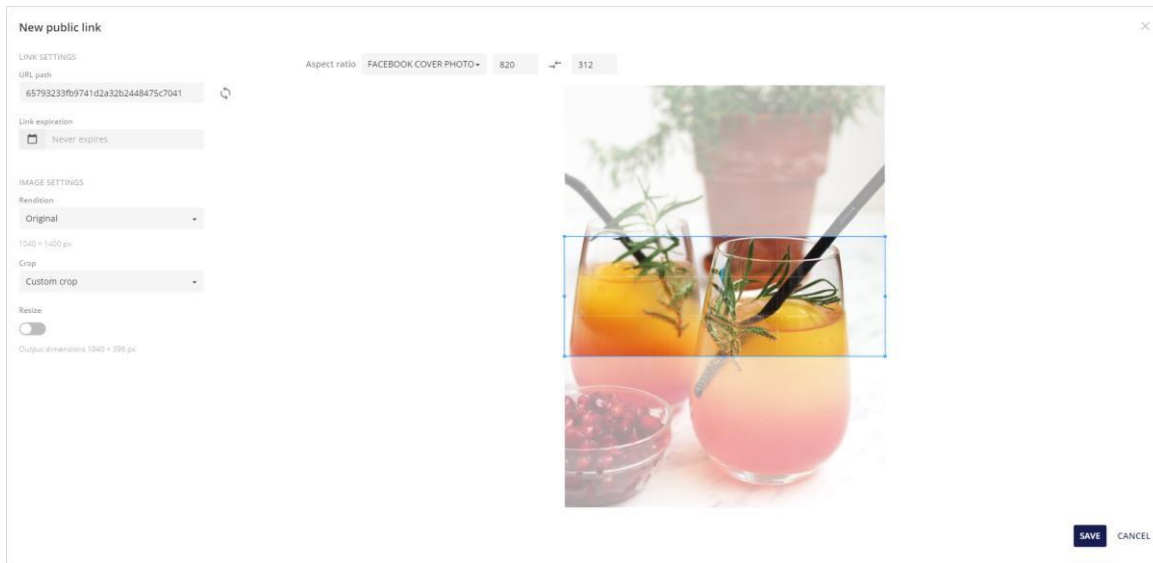
The **Custom crop** option displays the aspect ratio field, offering the following preset values:

Group	Values
Common	Free, 16:9, 2:1, 3:2, 4:3, 5:4, Original, Square.
Facebook	Facebook Cover Photo, Facebook Event Image, Facebook Highlighted Image, Facebook Shared Image.
Instagram	Instagram Photo, Instagram Stories.
LinkedIn	LinkedIn Banner Image, LinkedIn Company Cover Image, LinkedIn Company Photos, LinkedIn Hero Photo, LinkedIn Personal Background Image, LinkedIn Shared Image, LinkedIn Shared Link.
Twitter	Twitter Header Photo, Twitter In-Stream Photo.
YouTube	YouTube Channel Cover Art, YouTube Channel Profile Image.

Note

The dimensions of the new image must always be smaller than the dimensions of the original image.

Width (px)		Height (px)
11111 ↕	🔓	62492

Must be smaller than original (4573 × 2572 px)
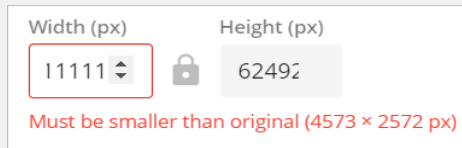
The lock icon is shown open when the aspect ratio can be changed and closed when the aspect ratio cannot be changed.

Width (px)		Height (px)
4896	🔒	100

Width (px)		Height (px)
4896	🔒	2895
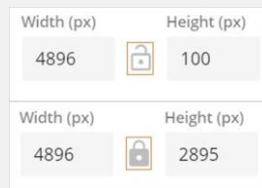
The aspect ratio values can be customized in Sitecore DAM™.

1.6 Available transformations

Transformations allow renditions to be dynamically resized by specifying the transformation directly in the public link URL. More specifically, transformations allow the user to resize the rendition without having to regenerate the public link.

Superusers are able to manage and configure the transformation presets. The following image lists the out-of-the-box transformations:

Name	Width (px)	Quality
w320	320	Maximum quality
w480	480	Maximum quality
w1200	1200	Maximum quality
w800	800	Maximum quality
w3000	3000	Maximum quality

To apply a transformation to a rendition, users need to append the transformation's name to the URL of the public link as a query parameter named "t". For example, we can apply a transformation called "W320" to an asset by appending the value **&t=W320** to the public link's URL.
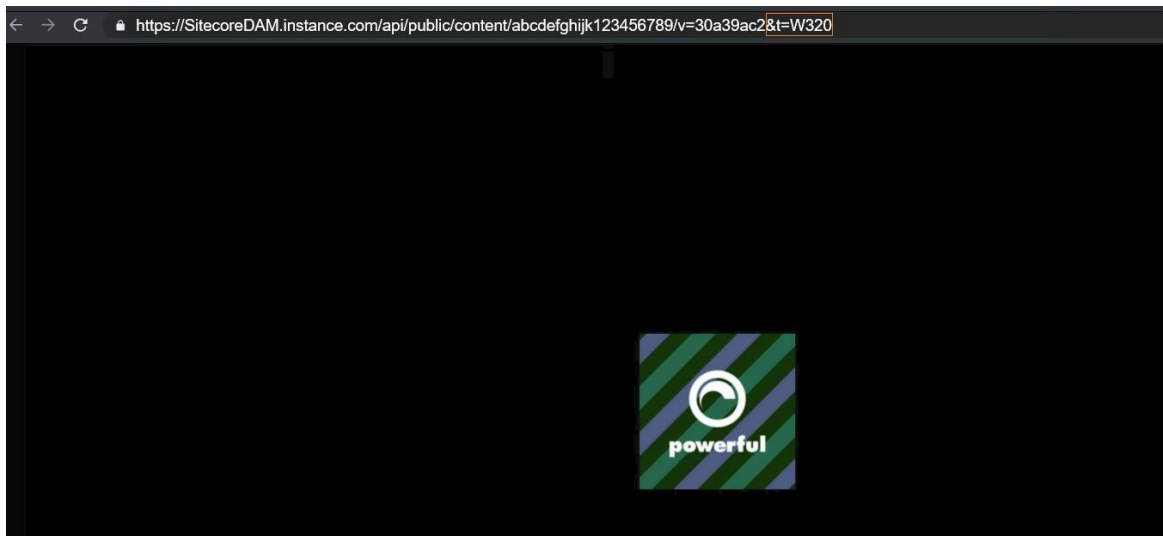
Note

Users can access and manage the available transformations in Sitecore DAM™. This action requires Superuser permissions.

1.6.1   Preview asset

The Preview page displays a preview with more details about the selected asset.
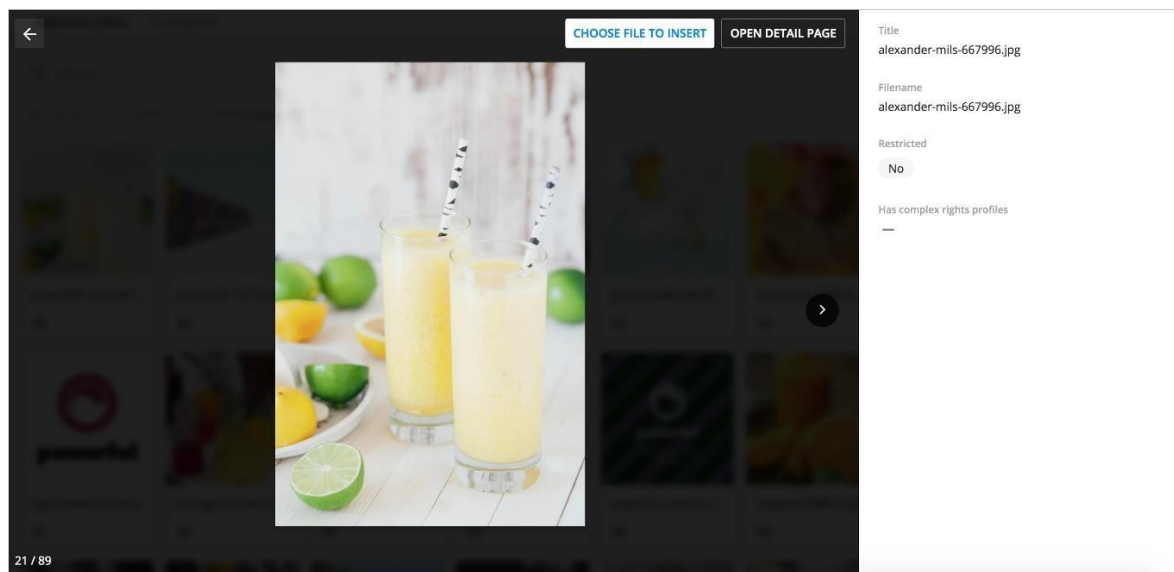
The preview page offers the following operations:

- **Choose file to insert**: Opens the **Choose file to insert** page where a file can be inserted using the public links.

- **Open detail page**: Redirects users to the **Detail** page of the selected asset in a new tab within the Sitecore DAM™

1.7 Known issues

Known issue	Version	Description	Workaround
Content type	**9.1 / 9.1.1 / 9.2**	When the **content type** of an asset is changed in Sitecore DAM™, the change is not reflected in Sitecore. The rendition in Sitecore will therefore not be shown.	n/a
Image Properties	**9.1 / 9.1.1 / 9.2**	**Content Editor**: Right-clicking on an image shows two options: I**mage Map Editor** and **Properties**. If either is selected, when clicking on the Image Manager icon the Media Library that is opened is not the DAM library but the sitecore/media library. There is no option to change the media library.	n/a
Clear the image field	**9.1 / 9.1.1**	**Content Editor:** With a Sitecore DAM™ image in the image field, clicking the **Clear** link does not clear the image field correctly. The thumbnail is cleared, but the URL remains.	Click on **Save** to resolve the issue.
Change an image	**9.1 / 9.1.1**	**Content Editor:** With a Sitecore DAM™ image inserted, by clicking **Browse** and selecting an image from the sitecore/media library. The image field is not cleared correctly.	Clear the field by using the clear link, save the item and then select a new image.
Clear the image field	**9.1 / 9.1.1**	**Experience Editor**: Clearing an image by clicking **Remove the image** without saving does not clear the field, even though the image is not displayed in the Experience Editor.	Click on **Save** to resolve the issue.
Change from DAM to media library image	**9.1 / 9.1.1**	**Experience Editor**: When an image from Sitecore DAM™ is inserted, then the user clicks Choose an image and inserts a new image from the sitecore/media library to replace the Sitecore DAM™ image, the field is not cleared correctly.	Click **Remove image** first, then click **Save** and then insert an image from the sitecore/media library.
SXA	**9.1**	SXA is not supported for this version.	n/a

Known issue	Version	Description	Workaround
SXA	**9.1.1 / 9.2**	If SXA is installed, and the IFrame is opening, the error "MAsset Command is not implemented" is returned and the IFrame fails to open.	This issue is resolved by updating the SXA config file Sitecore.XA.Feature. ContentTokens.config under the following path: **App_Config\Modul es\SXA\Feature**. In front of the Command Script tag, prepend the SXA key attribute: **<script key="SXA" src="/sitecore/shel l/Controls/Rich Text Edit/ Insert Content Token Command.js" language="Javascript"/>**
Behaviour Rich Text Editor	**9.1 / 9.1.1 / 9.2**	When inserting a video in the Rich Text Editor using the Design mode, the video cannot be moved or deleted. It can only be played. However, two console errors are thrown.	Switch to the HTML mode and adjust the video element as necessary.
Behaviour Rich Text Editor	**9.1 / 9.1.1 / 9.2**	When an item containing only a video is saved and reopened using the **Design** mode, the item is frozen and cannot be edited.	Switch to the HTML mode and add an element as necessary. This will unfreeze the item.