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Sitefinity Insight Quick Start Guide for Admins

GUIDE

Introduction

Progress® Sitefinity® Insight is a multi-tenant SaaS analytics system that helps organizations collect data from web-based and other channels, merge user interaction histories across multiple data sources and provide data-driven insights and recommendations to optimize the customer experience.

This guide will help website and marketing administrators set up Sitefinity Insight to work with Sitefinity websites as well as sites hosted by other systems, collect data from non-web channels and import data from external sources. Included examples will illustrate typical deployment scenarios and help you choose the appropriate configurations and data-tracking options that map to your specific context.

The **main concepts and factors** when planning your tracking setup are:

- Business goals
- Sites and domains
- Data sources
- Data centers
- Visitor data
- Third-party systems
- Deployment setup

In the following sections, you will see how these interrelated factors may affect or influence your tracking setup.

The process of setting up Sitefinity Insight can be broken down into **six main areas**:

1. Data collection plan [/4](#)

2. Administration of user accounts [/5](#)

3. Data sources and data centers [/6](#)

4. Connecting Sitefinity sites and Sitefinity Insight [/7](#)

5. Data tracking on non-Sitefinity sites and other channels [/8](#)

6. Data import from external CRMs or other sources of visitor data [/9](#)

As these areas are related to each other, you may want to approach them sequentially—especially in the planning phase. You can then refine your setup and expand the coverage of Sitefinity Insight as dictated by the needs of your marketing organization and your business.

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Data collection plan

Sitefinity Insight setup, selected options, and reports produced need to reflect and support your company's marketing goals and digital strategy. Work with your stakeholders to develop a common understanding and, ideally, create a requirements document that defines your key performance metrics, approach to lead funnel stages and personas and desired main sources of data collection, as well as all user roles that will need access to information in Sitefinity Insight. This will help devise a Sitefinity Insight setup that provides the proper datasets and reports to the right types of users.

READ MORE

- Introduction to Sitefinity Insight
- Plan data collection

Visitor data

Visitor data in Sitefinity Insight is tracked and collected via cookies. All interactions of a visitor with the same cookie comprise that visitor's journey. To get uniform tracking across sessions and domains, you need to make sure you properly configure Sitefinity Insight cookies to be visible to the relevant applications. Once users log in, their data from different sessions or through multiple channels is aggregated into a single user profile.

Sitefinity Insight is fully compliant with the European Union GDPR regulation, so Sitefinity Insight admins can export and delete personal data as per visitors' requests. Additionally, any visitor can opt out and not consent to provide their tracking data when browsing Sitefinity sites, so that their interactions are not reported to Sitefinity Insight.

READ MORE

- Plan the collection of visitor data
- Configure Sitefinity Insight cookies for sub-domains
- Manage personal data
- Set up tracking consent

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Administration of user accounts

1. Activate the admin user account of the license holder

As a new customer, you have a customer tenant account and an admin account created for the license holder. The license holder will get an invitation email from Sitefinity Insight with directions on how to activate their account.

As Sitefinity Insight uses Microsoft Azure AD for user management and authentication, be aware that some of the activation steps will be Microsoft-branded.

2. Invite other users

To work with Sitefinity Insight, a user needs to have an account. A new user account can be created by a Sitefinity Insight administrator, and Sitefinity Insight will automatically send an invitation email to the user with instructions on how to activate his or her account. A Sitefinity Insight administrator can further configure the permissions of each Sitefinity Insight user, including giving them full admin access if needed. Full admin access enables a user to create other users' accounts, along with a number of other privileges. Having more than one user with full admin access helps manage Sitefinity Insight without single-threading through one person.

How to invite a user to Sitefinity Insight:

1. Log into Sitefinity Insight via insight.sitefinity.com.
2. In your account, open the *Administration* panel and go to *Users*.
3. Click on *Invite a User*.
4. Enter the email of the user you want to give Sitefinity Insight access to.
5. Select the appropriate level of access and permissions.
   Please note that you can always change a user's access level and permissions by going to *Administration > Users* and clicking on the gear icon to the right of the user entry.

You may want to delay adding specific users and permissions until after you setup your data centers. At that point, it may be easier to determine whether particular users need global administrative access on an account or data center level or just limited permissions to view reports and data.
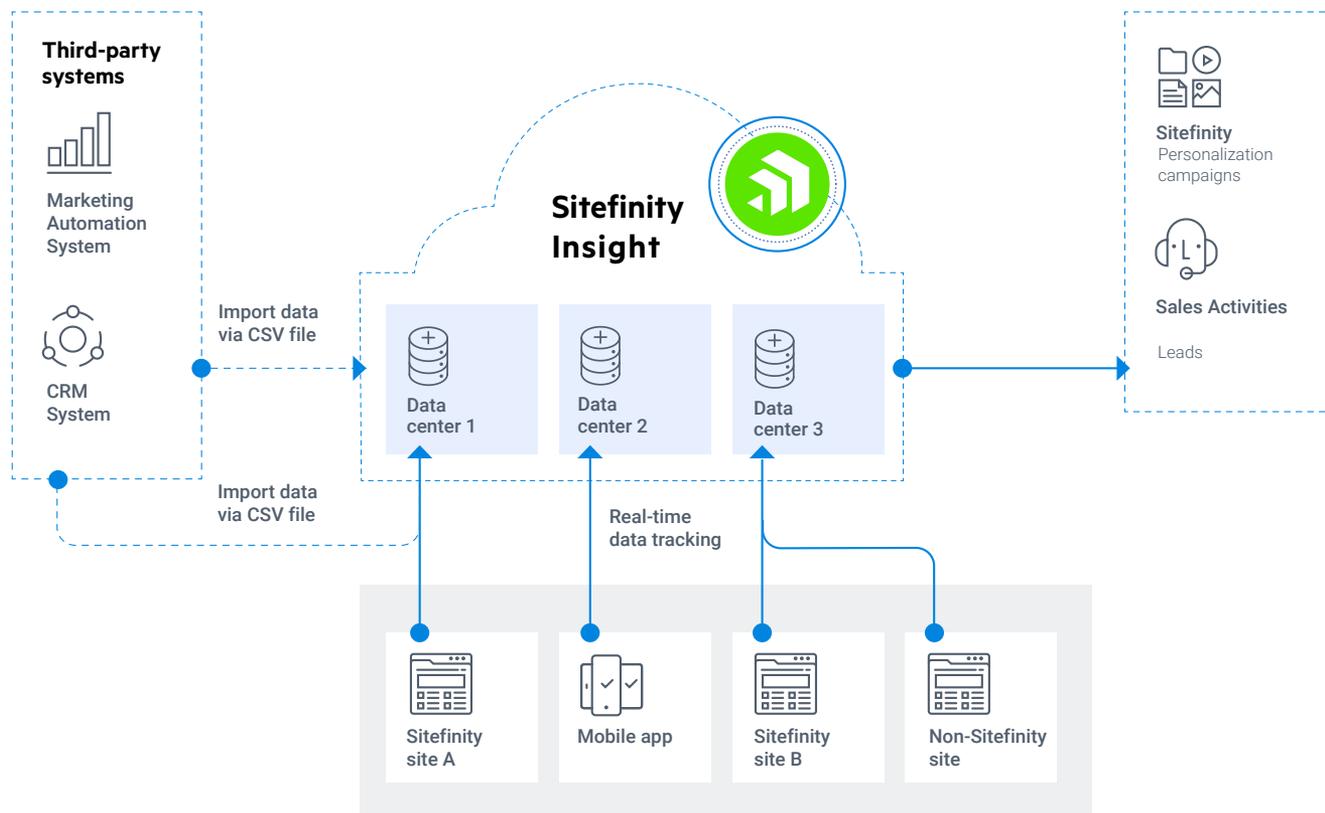
READ MORE

- How to access Sitefinity Insight
- Invite users

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Data sources and data centers

The next step in your web tracking setup is identifying where your visitor data comes from (data sources) and where you store that data (data centers).

Third-party systems

Marketing Automation System

CRM System

Import data via CSV file

Import data via CSV file

Sitefinity Insight

Data center 1

Data center 2

Data center 3

Real-time data tracking

Sitefinity site A

Mobile app

Sitefinity site B

Non-Sitefinity site

Sitefinity
Personalization campaigns

Sales Activities

Leads

A **data source** is any website, web or mobile application, or chat application that contains or can provide visitor demographic or interaction data. As illustrated by the diagram above, Sitefinity Insight tracks this data in real time (take note that for non-Sitefinity data sources, tracking and timing depend on the specific implementation in place). This data, collected from one or more data sources, is stored into specific data centers.

A data source can also be a CRM or marketing automation system, from which you can export/import data via a generic CSV file. You can do scheduled or trigger-based imports of data from certain systems, such as Salesforce and Eloqua, to be stored in a specific Sitefinity Insight data center.

A **data center** in Sitefinity Insight is a single logical data store that can accumulate visitor interaction data from one or more data sources (websites, applications or systems) as pictured on the diagram above. A Sitefinity Insight data center can be created by any user with admin privileges, who can then give other users access to the data center. Once user data is captured, marketers can leverage that data to better

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focus their personalization campaigns and generate qualified leads for the sales team to follow up with. Sitefinity Insight can accommodate an unlimited number of data centers. However, reports, data operations, and available analytics are tied to a single data center at a time.

How to create a data center:

1. In Sitefinity Insight, open the *Administration* panel.
2. Click *Data Centers*.
3. Under the *Data Centers* section, click on *Create Data Center* and fill out the name and description of the new data center.

The new data center is now added to the list under your account. The next two sections of this guide provide details on how to map data sources to data centers based on your organization's marketing requirements.

READ MORE

- [Data centers and data sources overview](#)
- [Data sources](#)
- [Manage users in data centers and accounts](#)

Connect your Sitefinity sites to Sitefinity Insight

Sitefinity CMS and Sitefinity Insight are tightly integrated by a built-in connector, which securely sends data to Sitefinity Insight from the websites managed by Sitefinity. It also provides various configuration options in Sitefinity to personalize the websites based on the data available in Sitefinity Insight. When setting up the connector within Sitefinity, you map a website, i.e. a data source, to a specific data center in Sitefinity Insight and specify what kind of data you want collected. This configuration supports secure data transmission and uses an API key specific to the data center to get personalization information, create content touchpoints, and so on. You will need to set up the Sitefinity Insight connector for each of the websites managed by Sitefinity.

How to set up the Sitefinity Insight connector for a Sitefinity site:

1. In Sitefinity Insight, open the *Administration* panel.
2. Click *Data Centers.*
3. Click on *Access Keys.*
4. [Generate an access key](#) for your data center(s) and copy the key.

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5. In Sitefinity, open the *Administration* panel and then *Connector for Sitefinity Insight.*

6. Paste the access key.

7. Connect your website to Sitefinity Insight.

Depending on your scenario, you can configure the connector to track websites, domains and sub-domains together or separately. We will cover different scenarios of website mapping to data centers later in the *Setup Scenarios* section.

Important connection settings

- Make sure the proper Sitefinity Insight deployment URL is configured in the *Advanced Settings* of the Sitefinity Insight connector.
  Details

- Firewall configuration
  Make sure the access to the Sitefinity Insight deployment URLs is not restricted.
  Details

- Track specific sites in multisite environment (Sitefinity Insight connector)
  Tracking > Add Tracking > map sites to a specific data center in Sitefinity Insight.
  Details

- Track specific sub-domains (Sitefinity *Advanced Settings*)
  Administration > Advanced Settings > DigitalExperienceCloudConnector.
  Details

READ MORE

- Connect to Sitefinity Insight
- Access keys
- Tracking setup of sites and domains

Track data from non-Sitefinity sites and other channels

Most modern customer journeys extend beyond a single website or channel, spanning non-Sitefinity sites, mobile apps and possibly other channels. Acquiring

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visitor interaction data from these channels is essential for building comprehensive visitor profiles in support of effective digital marketing. This composite data can be used for marketing analytics within Sitefinity Insight, for personalization within Sitefinity websites or via other channels using Sitefinity Insight personas.

Typically, tracking interactions outside of Sitefinity-managed websites requires implementing custom code with the help of the Sitefinity Insight SDKs. Sitefinity Insight SDKs enable you to collect data from non-Sitefinity websites, mobile applications and other interaction-based systems to report interactions to a specific data center. You can capture client-side data with the JavaScript SDK and server-side data with the .NET SDK.

READ MORE

- Capture client-side data with JavaScript SDK
- Capture server-side data with .NET SDK

Import data from other systems

Sitefinity Insight enables you to import data from other martech systems, including **CRM systems and marketing automation systems**, and merge and centralize visitor data to a dedicated data center for further analysis and reporting. Sitefinity Insight comes with pre-built, configurable connectors for Salesforce and Eloqua that enable direct data import from these systems. For other systems, data is exported using a CSV file and loaded into Sitefinity Insight.

In case you need to build a custom automated integration with these or other systems, you can leverage the Sitefinity Insight SDKs and REST API. You can also benefit from Google services to collect data via the Google Tag Manager.

READ MORE

- Data integration and data imports
- Upload data with CSV files
- How to use Google Tag Manager with Sitefinity Insight
- Sitefinity Insight developer docs

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Example setup scenarios

This section provides a few example scenarios to illustrate different configuration options for Sitefinity Insight. These scenarios are built around the types of presumed audiences and typical visitor journeys, as well as common website structure and setup.

Scenario 1: Track a single website

A company has a single Sitefinity website. The website is the only source of audience interaction data. This scenario has two variations, depending on the deployment model and number of environments used. For this scenario, it is generally recommended to use a dedicated data center for each environment to avoid data pollution. However, there are use cases when a single data center can do the job, as pointed out in the table below.

Use case	Data sources	Key factors	Sitefinity Insight setup
A simple deployment model with two environments: one live and one for testing. Each update gets tested on the test environment before promoting it to the live site.	Single Sitefinity website	• Multiple environments • Filter unwanted data	Setup a single data center and then: 1. Connect to Sitefinity Insight. 2. Configure IP filtering. You thus exclude the test interactions on the website that would create noticeable "noise" in the data results set. You specify IP address ranges of servers used for testing or the domains of your teammates' emails that are used for testing. For the latter, contact our support for help.
A deployment model with staging/UAT and production environment, on which the code gets promoted. You need to test personalization settings on the UAT environment, yet not pollute the real audience data with test data.	Single Sitefinity website	• Multiple environments • Filter tracked data • Disable tracking	Initially two data centers – one for testing and one for the production. When the site goes live: 1. Connect the production site to the production data center. 2. Reconnect the staging/test site to the production data center in read-only mode. Thus, the test site can use all production configurations but does not contribute to recorded site traffic.

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Scenario 2: Tracking multiple websites

In case of multisite websites, you need to decide on how many data centers to create and how to map various sites (whether hosted on Sitefinity or not) to them. This decision usually boils down to whether sites have overlapping audiences, content and, ultimately, data.

> If you expect your audience to visit all your sites and you want to track the journeys across all of them, you usually connect all your sites to one data center. If there are distinct expected audiences that visit different sites, create a different data center to roughly match all sites for each distinct audience to one data center.

Same goes for non-Sitefinity managed channels, such as other websites, ecommerce portals, mobile applications and so on. It is best to map these channels in a way that a data center accumulates the data for the majority of audience journeys you are interested in.

Scenario 3: Tracking multiple websites and other data sources

Let's look at a fictional portal for international students, which has a good number of sites for different purposes and audiences. The university websites play a vital role in attracting prospects, keeping the alumni community alive, sharing success stories, promoting events and providing access to valuable third-party resources via its library.

Technically speaking, this example illustrates a "multiple sites" scenario with multiple domains and sub-domains. We assume that sites are running on a single multisite Sitefinity instance, but the whole university online experience also includes a mobile app, some non-Sitefinity sites and audience databases.

Use case	Data Sources	Key Factors	Sitefinity Insight setup
The university graduate programs website is accessible in different languages to appeal to scholars around the globe and provide success stories. The goal is to increase engagement and traffic.	Single multilingual Sitefinity site	• Single site and domains • Global overlapping audience • Same business focus	Single data center. 1. Connect to Sitefinity Insight 2. Configure IP filtering to exclude the interactions from the university staff members.

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Use case	Data sources	Key factors	Sitefinity Insight setup
Each regional campus of the university has a dedicated site with a different business focus to attract prospects to the sites and on the campus for events and increasing the awareness for new campuses.	Different Sitefinity sites	• Multiple sites and domains • Audience does not overlap • Marketing goals are different for each site • Differing site structure and content	• Multiple data centers. • Each site's data is tracked in a dedicated data center, so that data for different expected audiences is kept separate
The university has started a campaign to popularize the in-house library among students and faculty. The book catalogue and online publications are on a separate, non-Sitefinity portal and books can be accessed and reserved both via the desktop site or the mobile app.	Cross-tracking of data across a Sitefinity site, non-Sitefinity site, and a mobile app	• Multiple sites and domains • Audiences overlap • Same marketing goal	• Single data center. • Custom code in the non-Sitefinity website to track the interactions using the .NET SDK and/or JavaScript SDK. • Custom code using the API endpoints to track the interactions on the mobile app and the non-Sitefinity site.
The university is revamping its *Applications* section. Development and design teams are working and testing the new design in a staging environment.	Multiple environments with internal and external visitors	• Multiple environments	• Multiple data centers. • To avoid having test data in the production data center, configure dedicated data centers for each environment.

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Use case	Data sources	Key factors	Sitefinity Insight setup
The *Applications* section is undergoing lots of content modifications, done in an internal content staging internal environment. The environment allows for content editors to test out personalization configurations or A/B testing, as well as content preview.	Multiple environments with internal and external visitors	• Content-staging environment • Disable data collection but keep Sitefinity Insight configuration options active	• Single data center. • Stop tracking internal traffic and interactions by disabling Sitefinity Insight tracking on the content staging environment, while keeping Sitefinity Insight tracking enabled on live environment.
To register for a specific class, students need to complete an online form provided by Eloqua. Student information is stored in a custom student database.	• Third-party marketing automation system • Import student data via CSV file	• Systems and data • Offline data	Single data center. 1. Connect Sitefinity to Eloqua. 2. Import data from Eloqua via import data queries. 3. Import excel data via CSV file.
The university has a custom *Webinar* module in their Sitefinity website which is not tracked out-of-the-box. The *Admissions* department need to track audience engagement with the viewers, as well as questions they are posting.	Custom module in Sitefinity website	• Custom tracking	• Single data center. • Implement custom code to track the interactions using the .NET SDK and/or JavaScript SDK.

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Sitefinity Insight setup checklist

By now you should be acquainted with the key concepts and factors to take into account when planning your Sitefinity Insight data tracking setup. Use this checklist to guide you while setting up Sitefinity Insight:

✓ **Decide on web tracking setup**
Based on marketing requirements, plan how data sources and data centers should be connected

✓ **Connect your site(s) to Sitefinity Insight via the Sitefinity Insight connector**

- Create data centers (Sitefinity Insight)
- Get access keys (Sitefinity Insight)
- Sitefinity Insight connector configurations – deployment URL configuration, firewall settings based on deployment (Sitefinity)
- Connect websites and domains to data centers via the Sitefinity Insight connector (Sitefinity)

✓ **Configure external visitor data tracking**

- Data integration – Salesforce, Eloqua, CSV (Sitefinity Insight)
- Non-Sitefinity data sources (Sitefinity Insight)
  - REST API and SDKs
  - Google Tag Manager

✓ **Refine and enhance tracking**

- Custom tracking client-side and server-side (Sitefinity Insight)
- Custom widgets (Sitefinity)

✓ **Iterate**

Based on your marketing team's feedback and requirements, always make room for modifications and iterations of your visitor data collection setup.

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Resources

Here are all resources referenced in this paper along with a brief description of each resource:

[Terminology](#)
Refer to this list of terms you may need to better understand Sitefinity Insight.

[Start tracking your sites](#)
Gives a detailed overview of the setup planning process, along with examples of how to translate business and marketing requirements into Sitefinity Insight specifics.

[Connect to Sitefinity Insight](#)
Understand how to configure your connection to Sitefinity Insight and how to define which sites and domains to track.

[Manage users in data centers and accounts](#)
Assign users in your account to data centers and grant users different levels of access rights.

[Data centers: Manage and administer data](#)
Provides information about how to manage your account and its data centers and maintain the system.

[Sitefinity Insight Development docs](#)
Understand how to work with the Sitefinity Insight API and .NET and JavaScript SDKs.

[Sitefinity Insight training classes](#)
Click the North America or EMEA links to check for online classes in your region.

Learn more

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