Clay Tablet Connector for Sitecore

# Installation and Configuration Guide

Special Edition for use with Lionbridge Freeway

Version 3.9.0

May 26, 2015

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# 1 Welcome to the Clay Tablet Connector for Sitecore

Welcome to the Clay Tablet Connector for Sitecore, Special Edition for use with Lionbridge Freeway ("Connector"). This is Clay Tablet's connector between Sitecore and the Clay Tablet Platform. This special edition enables you to automate sending and retrieving content from Sitecoredirectly to and from Freeway.

## 1.1 Terminology

| | |
|---|---|
| **Amazon AWS** | Amazon Web Services. A suite of web application products developed and sold by Amazon.com. Clay Tablet uses various AWS offerings in order to leverage their infrastructure and build rich, dynamic solutions for its customers, specifically, the Clay Tablet Platform. For details, see http://aws.amazon.com. |
| **Amazon S3** | Amazon Simple Storage Service. For details, see: http://aws.amazon.com/s3/. <br><br> The Connector and the Clay Tablet Platform use Amazon S3 to provide temporary storage services for the content sent to and from translation. |
| **Amazon SQS** | Amazon Simple Queue Service. For details, see: http://aws.amazon.com/sqs/. <br><br> The Connector uses Amazon SQS to provide Message Queue Services. |
| **Asset** | Any content or document being sent for translation, including metadata. Assets are created by the Connector. |
| **Clay Tablet (CTT)** | Clay Tablet Technologies, the corporate entity that publishes the Clay Tablet Connector and the Clay Tablet Platform. |
| **Clay Tablet Platform** | The hosted (IaaS) connectivity platform that receives and routes content from content systems, including content management systems (CMSs), to translation providers and back during implementation. Clay Tablet Technologies configures the Platform based on the number and nature of systems involved in your system architecture. |
| **Clay Tablet Connector for Sitecore ("Connector")** | The connector software that Clay Tablet Technologies has developed and provides, which plugs into your Sitecore CMS to provide connectivity to our hosted Platform. In this document it is referred to as the Connector. This is the software you are installing and configuring as you work through this document. |
| **CT3** | Legacy branding term that refers to the Connector. |
| **Freeway** | The name of the Lionbridge translation portal for submitting content to and retrieving content from the Lionbridge translation provider. |
| **FTP Server** | File Transfer Protocol (FTP) is a standard network protocol used to transfer files from one host to another host over a TCP-based network, such as the Internet. Translation providers may receive and send files for translation using an FTP server. |
| **IaaS** | Infrastructure as a Service. The Clay Tablet Platform is an IaaS, because it is a hosted platform. |

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| Keys | The Connector uses keys to establish a secure, discrete connection between the Connector instance and the Platform. |
| --- | --- |
| | **Very important:** Do not copy the CMS address keys to multiple Sitecore instances, because this is a violation of the Clay Tablet License Agreement. Using the same CMS address keys on multiple Sitecore instances will cause the Connector to behave unexpectedly, which can result in lost translation content, orphaned projects, and inaccurate translation status reports. Clay Tablet will only support technical issues caused by duplicating or incorrectly installing CMS address keys on a time and materials basis. |
| Lionbridge | The publisher of the Freeway translation portal and a translation provider. Users connect to the Freeway translation portal to submit content to and retrieve content from the Lionbridge translation provider. |
| On-Premise Platform | A version of the Clay Tablet Platform that is hosted on the premises of a Clay Tablet client, instead of on AWS. |
| MT | Machine translation. The translation provider can be a machine translation service, such as Google Translate. |
| Producer | CMS or another system that sends content or documents out for translation. In this case, this is your Sitecore Content Editor. |
| Provider | A provider of translation services. The delivery of assets to the provider may be via an FTP server or a TMS connector. |
| Support Asset | Supporting documents and their metadata.  Support assets are not translated by the translation provider, but they provide helpful context for the translator. |
| TMS | Translation management system that the translation provider users. |

## 1.2  About the Clay Tablet Translation Platform

Clay Tablet's translation connectivity platform is the easiest, most flexible way to integrate content systems, including content management systems (CMSs) and other content producers, with translation providers and translation technologies.

Clay Tablet Platform is the hosted (IaaS) connectivity platform that receives and routes content from content management systems to translation providers and back, including to Lionbridge via Freeway. It is hosted on Amazon Web Services (AWS). During implementation, Clay Tablet Technologies configures the Platform for your translation solution, based on the translation providers or systems you use. The Clay Tablet Platform uses the following services on AWS:

- S3 (Amazon Simple Storage Service), which provides storage services for the content sent to and from translation.

- SQS (Amazon Simple Queue Service), which provides message queue services.

## 1.3  How the Clay Tablet Connector Works with Sitecore and Freeway

The Clay Tablet Connector ("Connector") is an important part of the Clay Tablet translation solution.

The Connector is installed on your system as an add-in to the Sitecore CMS. Its functionality is displayed to the users as part of the Sitecore Content Editor, Page Editor, and Desktop.
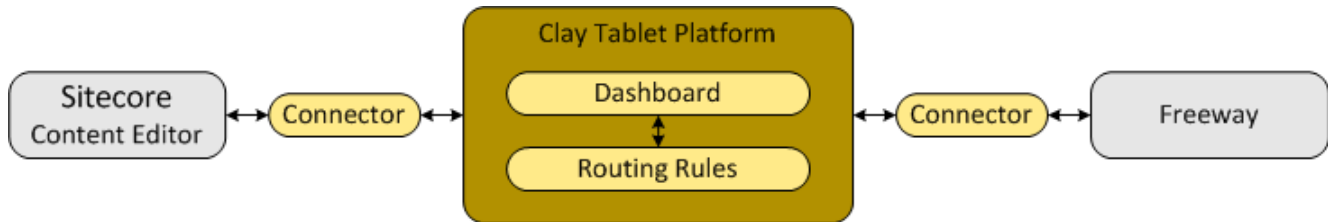
Your translation systems architecture might look like the configuration above. It may have additional CMSs or translation providers in addition to Lionbridge, which is accessed via Freeway, but the core concepts remain the same.

During implementation, Clay Tablet works with you and your translation providers to configure and test the other elements of your translation solution, which are the Clay Tablet Platform's connections to your translation providers' systems.

## 1.4  Using this Guide

### Purpose of this guide

This guide describes everything you need to know to install and configure the Clay Tablet Connector ("Connector") for Sitecore. It describes the delivery package contents, system requirements, installation instructions, and configuration procedures.

**Recommendation:** Review the user guide to fully understand the powerful features of the Connector.

### Who should use this guide

This guide is intended for Sitecore administrators and system integrators.

### What you should already know

This document assumes that your company already has an installed instance of Sitecore.  It also assumes that Lionbridge is your company's translation provider, and Freeway is already set up for your company. It assumes that you have a strong working knowledge of the Sitecore Content Editor and Sitecore features, specifically how to configure workflows and associate them with templates.

### How to find out more about the Clay Tablet Connector for Sitecore

For information on using the Clay Tablet Connector to send and receive content for translation from Sitecore, read the *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*.

### Documentation conventions

This guide uses the following conventions:

| Convention | Description |
| --- | --- |
| **Bold** | Highlights screen elements such as buttons, menu items, and fields. |
| `Courier` | Highlights input, file names, and paths. |
| *Italics* | Highlights terms to emphasize, variables, or document titles. |
| > | Indicates a menu choice. For example, "Select **Sitecore Desktop > All Applications > CTC Translation > Translation Filter**." |

## 1.5  How to Contact Clay Tablet Support

Email @: support@clay-tablet.com

Telephone: +1-416-363-0888 option "3"

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# 2 Before You Install

Before you begin to install the Clay Tablet Connector for Sitecore, please review the system requirements, described below, and perform the following pre-installation procedures:

1. "Setting Your System Date, Time, and Time Zone Correctly" as described below.

2. "Downloading the Delivery Package" as described on page 10. This describes the contents of the Connector delivery package that Clay Tablet Technologies sends you.

3. "Setting Up the Translation Database" as described on page 11. This section includes information about database size requirements as well as detailed instructions for Oracle and Microsoft SQL Server databases.

4. "Creating the Connector Folders" as described on page 14. These are the folders where the Connector stores your licensing information and your translation data.

5. "Installing the CMS Address Key and the Platform Key" as described on page 14. These are your license keys.

**Very important:** Do not copy the CMS address keys to multiple Sitecore instances, because this is a violation of the Clay Tablet License Agreement. Using the same CMS address keys on multiple Sitecore instances will cause the Connector to behave unexpectedly, which can result in lost translation content, orphaned projects, and inaccurate translation status reports. Clay Tablet will only support technical issues caused by duplicating or incorrectly installing CMS address keys on a time and materials basis.

## 2.1 System Requirements

The Clay Tablet Connector for Sitecore must be installed on the machine where Sitecore is installed. The Clay Tablet Connector for Sitecore supports Sitecore versions 6.4 and higher, including all current releases.

The Clay Tablet Connector for Sitecore has no additional hardware or software requirements beyond those of Sitecore CE. For detailed requirements, refer to the appropriate version of the *Sitecore CMS Installation Guide*. This guide is available in the documentation section of the Sitecore Developer Network (SDN) site, at http://sdn.sitecore.net/Reference.aspx. You must log in to this site to access the documentation.

## 2.2 Setting Your System Date, Time, and Time Zone Correctly

The Clay Tablet Connector sends content to and receives content from the Clay Tablet Platform, which is hosted in the Amazon Web Services (AWS) environment. AWS requires any machines that connect to its applications to have the correct system time and date settings.

**Important:** Before proceeding, ensure that the system date, time, and time zone are set correctly on any systems that will run the Clay Tablet Connector. If these settings are incorrect, the following error message is displayed: `Error. The difference between the request time and the current time is too large.`

## 2.3 Downloading the Delivery Package

1. Download the Clay Tablet Connector ("Connector") delivery package from the link that Clay Tablet Technologies sends you. This is a `.rar` file, which is a zipped file that contains that contains the following five folders:

| Folder Name | Description |
|---|---|
| Accounts | Two or more keys, which enable the Connector to access the storage and message-queue services on the Amazon S3 and SQS web services. Each key is in a separate XML file.<br>■ `source.xml`: The Connector uses this CMS address key to move the files your company exports from Sitecore to the Clay Tablet Platform. The Platform then forwards your exported files to your translation provider. If you have multiple Sitecore installations, you must have one key (file) for each environment. If you are using multiple translation providers, there is one key (file) for each provider.<br>■ `target.xml`: This is your company's platform key, for the Clay Tablet Platform.<br><br>**Very important:** Do not copy the CMS address keys to multiple Sitecore instances, because this is a violation of the Clay Tablet License Agreement. Using the same CMS address keys on multiple Sitecore instances will cause the Connector to behave unexpectedly, which can result in lost translation content, orphaned projects, and inaccurate translation status reports. Clay Tablet will only support technical issues caused by duplicating or incorrectly installing CMS address keys on a time and materials basis. |
| Documents | ■ *Clay Tablet Connector for Sitecore Installation and Configuration Guide, Special Edition for use with Lionbridge Freeway* (this document)<br>■ *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*<br>■ `CT3_LanguageCodes.txt`: The Connector language codes. Later you will set up these codes for each Sitecore language your company uses for translation, both source and target languages. |
| Sitecore Package | `CT35_Sitecore6_Client-3.x.x.zip`, where *x.x* is the current version number of the Connector for Sitecore. This the installation package that you will install into your Sitecore Content Editor system. |
| Workbox | Advanced Workbox is an optional feature, which replaces the standard Sitecore Workbox. It enables much more powerful management of large lists of items, including by language. You can sort by different column headings, approve many items at once, and manage the display of long lists easily.<br><br>**Important:** Install this feature only if you are comfortable with replacing the standard Sitecore workbox.<br><br>This folder contains the following items:<br>■ Advanced Workbox installation package<br>■ Advanced Workbox Installation Guide |

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2. Unzip the delivery package file you downloaded, and save its contents to a convenient location.

## 2.4 Setting Up the Translation Database

You set up the database so that the Connector can use it to store translation-related data.

- For instruction on setting up a Microsoft SQL Server database, see page 11.

- For instructions on setting up an Oracle database, see page 12.

- For instructions on setting up a Microsoft Azure SQL database, see page 13.

### 2.4.1 Translation database size requirements

The required size of the database depends on the volume of translation you anticipate. When the database is used only for translation-related data, 100MB is usually adequate. However, by default, the Clay Tablet Connector backs up translation data, which it uses to support the Translation Correction, Update Remote TM, and SyncTranslation features. For descriptions of these features, refer to the *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*.

- If you keep the default setting of backing up data so that you can use these features, you may need to increase the size of the database by 50 to 100 percent to support the backup.

- If you do not want to back up data, you do not need to increase the size of the database.

  **Note:** To prevent the Connector from backing up translation-related data, you modify the `ClayTablet.BackupTranslationData` setting, described in "Configuring Global Translation Settings" on page 19.

You can use the Connector to delete the translation-backup database at anytime from the Sitecore Content Editor, however the relevant Connector features will not work properly. For instructions on deleting the backup, refer to the *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*.

### 2.4.2 Setting Up a Microsoft SQL Server-Based Translation Database

This section describes how to set up a Microsoft SQL Server database to use with the Connector. For information on database size requirements, see "Setting Up the Translation Database" on page 11.

1. Use Microsoft SQL Server Management Studio to create an empty database. For detailed instructions, refer to the Microsoft SQL Server documentation.

   **Recommendation:** Name the new database `CT3Translation`.

2. Configure the Connector database connection string. The `Website_root/App_Config/ConnectionStrings.config` file defines the database connections.

**Important:** The database part of the connection string must match the database name you created in the previous step.

Typically, it should be:

```
<?xml version="1.0" encoding="utf-8"?>
<connectionStrings>
  <!--
    Sitecore connection strings.
    All database connections for Sitecore are configured here.
  -->
  <add name="core" connectionString="user id=xxx;password=xxxt;Data
  Source=xxx;Database=XXX_Core"/>
  <add name="master" connectionString="user id=xxx;password=xxxt;Data
  Source=xxxx;Database=XXX_Master"/>
  <add name="web" connectionString="user id=xx;password=xxx;Data
  Source=xxx;Database=XXX_Web"/>
</connectionStrings>
```

You must add one more connection string called `CT3Translation` for the Connector database. This is the name of the database from above:

```
<add name="CT3Translation" connectionString="user id=xxx;password=xxx;Data
Source=xxx;Database= CT3Translation "/>
```

**Note:** Do not use any name other than `CT3Translation` for the connection string.

The `User ID`, `password`, and `Data Source` values are usually the same as those used for the other connection strings.

**Note:** The user specified in the connection string must have permission to modify the table structure in the database. This user must have permission to run `ALTER TABLE` statements.

### 2.4.3  Setting Up an Oracle-Based Translation Database

This section describes how to set up an Oracle database to use with the Connector. For information on database size requirements, see "Setting Up the Translation Database" on page 11.

**Recommendation:** Create a separate Oracle database user for Clay Tablet data. Alternatively, you can use an existing Oracle database user for Clay Tablet data.

1.  Optional. Create a Oracle database user for Clay Tablet data, using SQL statements similar to the following:

```
CREATE USER ctttrans IDENTIFIED BY xxxxxxxx
DEFAULT TABLESPACE users TEMPORARY TABLESPACE temp;
GRANT UNLIMITED TABLESPACE TO ctttrans;
GRANT CONNECT, CREATE TABLE TO ctttrans;
```

2. Add a `CT3Translation.Oracle` connection to the Sitecore connection string configuration. Add the following to the Sitecore connection string configuration:

```
<add name="CT3Translation.Oracle" connectionString="user
id=ctttrans;password=xxxxxxxx;Data Source=XE"/>
```

Depending on the active configuration in the user's setup, this is one of the following:

- `Website/App_Config/ConnectionStrings.config`

- `Website/App_Config/ConnectionStringsOracle.config`

**Note:** The user specified in the connection string must have permission to modify the table structure in the database. This user must have permission to run `ALTER TABLE` statements.

3. Ensure that the right version of `Oracle.DataAccess.dll` is in the `Website/bin` directory or in the right path. The DLL should match the Oracle database that the user is using. If the user is already using Oracle as the database for the Sitecore content, this should already be set up correctly.

### 2.4.4  Setting Up a Microsoft Azure SQL-Based Translation Database

This section describes how to set up a Microsoft Azure SQL database to use with the Connector. For information on database size requirements, see "Setting Up the Translation Database" on page 11.

1. Create an empty Azure database. For detailed instructions, refer to the Microsoft Azure documentation.

    **Recommendation:** Name the new database `CT3Translation`.

2. Configure the Connector database connection string. The `Website_root/App_Config/ConnectionStrings.config` file defines the database connections.

    **Important:** The database part of the connection string must match the database name you created in the previous step.

    Typically, it should be:

```
<?xml version="1.0" encoding="utf-8"?>
<connectionStrings>
  <!--
    Sitecore connection strings.
    All database connections for Sitecore are configured here.
  -->
  <add name="core" connectionString="user id=xxx;password=xxxt;Data
  Source=xxx;Database=XXX_Core"/>
  <add name="master" connectionString="user id=xxx;password=xxxt;Data
  Source=xxxx;Database=XXX_Master"/>
  <add name="web" connectionString="user id=xx;password=xxx;Data
  Source=xxx;Database=XXX_Web"/>
```

```
</connectionStrings>
```

You must add one more connection string called `CT3Translation` for the Connector database. This is the name of the database from above:

```
<add name="CT3Translation" connectionString="Data
Source=tcp:SERVER.database.windows.net;Initial Catalog=DB_NAME;Integrated
Security=False;User ID=USER_NAME@SERVER;Password=PASSWORD;Encrypt=True"/>
```

For example:

```
<add name="CT3Translation" connectionString="Data
Source=tcp:mpr0fb9mzh.database.windows.net;Initial Catalog=CTT;Integrated
Security=False;User ID=CTT@mpr0fb9mzh;Password=csct@blet99;Encrypt=True"/>
```

**Note:** Do not use any name other than `CT3Translation` for the connection string.

The `User ID`, `Password`, and `Data Source` values are usually the same as those used for the other connection strings.

**Note:** The user specified in the connection string must have permission to modify the table structure in the database. This user must have permission to run `ALTER TABLE` statements.

## 2.5  Creating the Connector Folders

This section describes how to create folders that the Connector uses to store licensing information and translation data.

1.  Under the Sitecore data folder, create the `CT3` folder.

     **Important:** Ensure that you create the `CT3` folder under the Sitecore data folder, and not under the Sitecore website root folder. To locate the Sitecore data folder, check the `Web.config` file, searching for a line such as:
     `<sc.variable name="dataFolder" value="C:\Inetpub\wwwroot\Sitecore6\Data\"/>`.
     For the location in this example, you would create the `CT3` folder as:
     `"C:\Inetpub\wwwroot\Sitecore6\Data\CT3"`.

2.  Create two sub-folders under the `CT3` folder you just created:

     ▒  `Accounts`. Set folder security so that the Windows account used by IIS has read permission.

     ▒  `Data`. Set folder security so that the Windows account used by IIS has full permission.

## 2.6  Installing the CMS Address Key and the Platform Key

**Very important:** Do not copy the CMS address keys to multiple Sitecore instances, because this is a violation of the Clay Tablet License Agreement. Using the same CMS address keys on multiple Sitecore instances will cause the Connector to behave unexpectedly, which can result in lost translation content, orphaned projects, and inaccurate translation status reports. Clay Tablet will only support technical issues caused by duplicating or incorrectly installing CMS address keys on a time and materials basis.

■ The Connector uses the CMS address key, which is in `source.xml`, to move the files your company exports from Sitecore to the Clay Tablet Platform. The Platform then forwards your exported files to your translation provider. If you have multiple Sitecore installations, there must be one key (file) for each environment. If you are using multiple translation providers, there must be one key (file) for each provider.

**Note:** The Connector always initiates calls to the Clay Tablet Platform. However, the CMS address keys enable establishing a secure, discrete connection between the Connector instance and the Platform. They also support the return of files from translation.

■ Your company's platform key is in `target.xml`. This is your company's license for the Clay Tablet Platform.

**Important:** If you do not install this key, the Connector will run. However, an **Upgrade** button will be displayed in the **CTC Translation** tab in the Sitecore Content Editor ribbon, and many user interfaces will display errors.

### To install the CMS address key and the platform key:

▸ Copy the file with the CMS address key (`source.xml` and the file with the platform key `target.xml`) from the `<Delivery Package/Accounts>` folder to the `CT3/Accounts` folder. This installs the license for one Sitecore instance and one translation provider.

**Note:** For instructions on installing CMS address keys for additional service providers, see "Configuring the Connector to Work with Multiple Translation Providers" on page 18.

Now you are ready to install the Connector, as described in "Installing the Clay Tablet Connector for Sitecore" on page 16.

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# 3  Installing the Clay Tablet Connector for Sitecore

This section describes how to install the Connector installation package you downloaded earlier into your Sitecore system.

Before you install the Clay Tablet Connector ("Connector"), verify that you have reviewed the system requirements and followed all the pre-installation procedures described in "Before You Install" on page 9.

To install the Connector into Sitecore:

1.  On the Sitecore Desktop, on the Windows Start menu, select **Sitecore > Development Tools > Installation Wizard**.

    The **Welcome** page of the **Sitecore Install Package** wizard opens.

2.  Click **Next**.

    The **Select Package** page of the **Sitecore Install Package** wizard opens.

3.  Click **Browse**, and locate the installation package, `CT35_Sitecore6_Client-3.x.x.zip`, where *x.x* is the current version number of the Connector for Sitecore that you downloaded and unzipped earlier.

    **Tip:** The installation package was in the following location in the delivery package: `<Delivery Package/Sitecore Package/CT35_Sitecore6_Client-3.x.x.zip>`.

4.  Click **Upload** to upload the package.

5.  After the package is uploaded, click **Next**.

6.  Follow any on-screen instructions to finish installing the Connector package into Sitecore.

Next you configure Connector parameters, as described in "Configuring the Clay Tablet Connector for Sitecore" on page 17.

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# 4  Configuring the Clay Tablet Connector for Sitecore

You perform the following steps to configure your Connector installation:

1. "Configuring the Connector for the Clay Tablet On-Premise Platform" on page 17. Required only if you are using the Clay Tablet On-Premise Platform ("Platform"), which is the Clay Tablet Platform that you host on your premises, in contrast to the Clay Tablet Platform that is hosted on AWS.

2. "Configuring Network Settings for a Firewall" on page 18. Optional.

3. "Configuring the Connector to Work with Multiple Translation Providers" on page 18. Required only if you will be sending content for translation to multiple translation providers.

4. "Configuring Global Translation Settings" on page 19.

5. "Configuring Global Service Settings" on page 26. Optional.

6. "Configuring the Sitecore Languages in the Sitecore Content Editor" on page 26.

7. "Configuring the Translation Workflow" on page 27.

8. "Filtering Fields in Items that Do Not Need Translation" on page 34.

9. "Configuring Connector Roles and Adding Users" on page 41.

10. "Configuring your Freeway Login Credentials" on page 41

## 4.1  Configuring the Connector for the Clay Tablet On-Premise Platform

If you are using the Clay Tablet On-Premise Platform ("Platform"), which is the Clay Tablet Platform that you host on your premises, you configure your Connector to point to this platform.

To configure the Connector to point to your Clay Tablet On-Premise Platform:

1. Open the `Website_root/Website/App_Config/Include/ CT3Translation.config` file for editing.

2. Uncomment the following setting:

   ```
   <!-- Uncomment this to configure URL to CTWS backend for On-Premise platform
   <setting name="ClayTablet.CTWS.URL" value="http://ctws.ctt-platform-int.com/"/>
   -->
   ```

3. Modify the `ClayTablet.CTWS.URL` setting to the DNS, IP address, or host name of the where your CTWS service is running on IIS.

   **Note:** The address must include the protocol, such as `http://` or `https://`, for example, `http://clay-tablet.com`.

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4.  Save your changes.

## 4.2  Configuring Network Settings for a Firewall

Optional step. If you have a firewall, you must configure your ports so that the Connector can communicate with the Clay Tablet Platform. The Connector must be able to communicate with the Clay Tablet Platform by initiating the following outbound network connections:

| Protocol | Port Number | Description | Location |
|----------|-------------|-------------|----------|
| HTTP | Port 80 | For access to Amazon's AWS S3 XML namespace and XSD file | http://s3.amazonaws.com |
| HTTP | Port 80 | For access to Amazon's AWS SQS XML namespace and XSD file | http://queue.amazonaws.com |
| HTTPS | Port 443 | For secure access to Amazon's AWS S3 service | https://s3.amazonaws.com |
| HTTPS | Port 443 | For secure access to Amazon's AWS SQS service | https://queue.amazonaws.com |

## 4.3  Configuring the Connector to Work with Multiple Translation Providers

This section is required only if your Connector will work with multiple translation providers. You can configure the Connector to work with multiple translation providers, so that you can send content to multiple translation vendors directly from Sitecore.

This section assumes that you have already installed the CMS address key (in source.xml) for your first (default) translation provider in step 4 of "Installing the Clay Tablet Connector for Sitecore" on page 16. The Connector requires a separate source.xml file for each translation provider, because the CMS address key is unique for each translation provider. The Connector uses this key to move your files from your Sitecore installation to the Clay Tablet Platform, and then to your translation provider.

**Note:** You use the same platform key (target.xml) for all your Sitecore installations and translation providers.
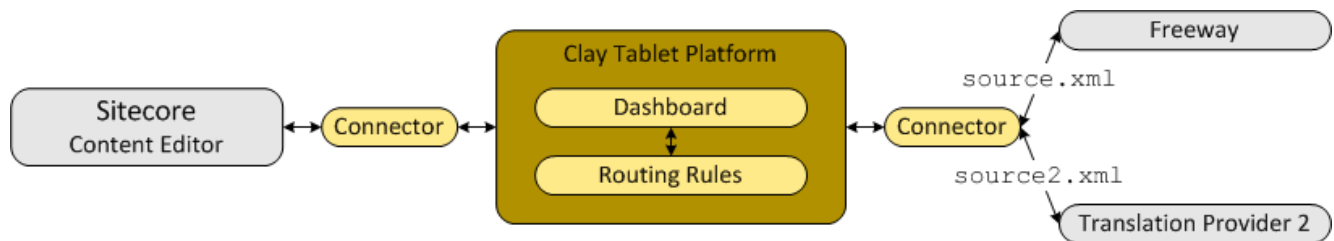


The instructions below describe how to install the CMS address key for your second translation provider:

1.  Rename the file with the CMS address key for your second translation provider to source2.xml. This will prevent overwriting the CMS address key that you previously installed.

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2. Copy the file with the CMS address key for your second translation provider to the following directory: `data/CT3/Accounts` on the Sitecore server.

3. Edit `Website/App_Config/Include/CT3Translation.config.` so that it is similar to the following:

The default translation provider is configured with `ClayTablet.Account` (the name of the translation provider), `ClayTablet.SourceAccount` (CMS address key), and `ClayTablet.TargetAccount` (account license key):

```
<setting name="ClayTablet.Account" value="Translation Provider Name"/>
<setting name="ClayTablet.SourceAccount"
value="$(dataFolder/CT3/Accounts/source.xml"/>
<setting name="ClayTablet.TargetAccount"
value="$(dataFolder/CT3/Accounts/target.xml"/>
```

The second translation provider is configured with `ClayTablet.Account2` (the name of the translation provider) and `ClayTablet.SourceAccount2` (CMS address key):

```
<setting name="ClayTablet.Account2" value="Translation Provider 2 Name"/>
<setting name="ClayTablet.SourceAccount2" value="$(dataFolder)
/CT3/Accounts/source2.xml"/>
```

The value of `ClayTablet.TargetAccount2` (account license key) is generally the same for all translation providers.

**Note:** If this value is the same as ClayTablet.TargetAccount, you do not have to modify it.

```
<setting name="ClayTablet.TargetAccount2" value="$(dataFolder)
/CT3/Accounts/target.xml"/>
```

Repeat these steps for each additional translation provider that you work with.

**Important:** Ensure that the files with the CMS address keys have unique names so that they do not overwrite the CMS address keys for other translation providers.

## 4.4 Configuring Global Translation Settings

The Connector's global translation settings determine how the Connector sends out all translation jobs.

To configure the Connector's global settings, you modify the following configuration file: `Website_root/Website/App_Config/Include/CT3Translation.config.`

| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. AccountIs Freeway | This identifies your company to Clay Tablet account as integrated with Freeway, so this should always be set to `True`. If your company is not using the Freeway integration, this setting is not required. | ▪ True ▪ False | |

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| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. LogFolder | By default, the Connector logs are in the same folder as the Sitecore logs. This enables you to use the Sitecore Log Viewer tool to view Connector logs as well. Connector log files use the following file-name format: `log.CTTLOG.yyyymmdd.txt`. | a path | $(dataFolder /Logs/ |
| ClayTablet. ProjectIdentifier | This creates the prefix for identifying the client in translation projects. For example, if the "ABC" client sets this to `ABC` and sends out the `marketing_post_Aug08` item for translation, the name of the translation project is `ABC_ marketing_post_Aug08`. | a text string | ClientName |
| ClayTablet. Translation Database | The location of your Sitecore content. If your Sitecore content is not in the `master` database, then you must change this value to match the name of your content database. | a database name | master |
| ClayTablet.Bulk Translation RootID | This sets the `/Sitecore/content` directory (ID: {0DE95AE4-41AB-4D01-9EB0-67441B7C2450}) as the default root from which the Connector collects items for translation for the Bulk Translation feature. This feature collects large batches of content from the site tree for bulk export. If you want content from only one site to be translated, then you must change the value of this item's ID to that path. For example if you want to translate items only from `Sitecore/Content/home/site1/`, then you must change the value of this item's ID to `Sitecore/Content/home/site1/`. **Note:** There can be only one root directory. | either the default ID or a path | {0DE95AE4-41AB-4D01-9EB0-67441B7C2450} |
| ClayTablet. Maximum ItemsInOne TranslationFile | This setting determines the maximum number of Sitecore items to pack into a single file for translation. You can adjust the number to better suit your translation requirements. **Recommendation:** Discuss this with your translation provider. | an integer | 100 |
| ClayTablet. PackedFile Format | The Connector can export Sitecore content (field content) in two different formats: XML and HTML. XML is the default format, which is acceptable to most translation providers. If your translation provider has difficulties handling XML files and can handle only HTML files, then you can change this setting to `HTML`. | either `XML` or `HTML` | XML |

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| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. Translate Common FolderItem | Determines whether the Connector sends out for translation content items that are based on a common-folder template, located in: `Templates/Common/Folder`. This determines whether the Connector sends out the folder's fields, including the folder name, for translation. | ■ True ■ False | False |
| ClayTablet. Backup TranslationData | Determines whether the Connector stores backup translation data on the Content Editor server to support the Translation Correction, Update Remote TM, and SyncTranslation features. For descriptions of these features, refer to the *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*. If you do not want to use these features, you can change this setting to `False`. This prevents substantial amounts of data from being stored on your Sitecore server, but it also prevents your company from accessing these useful features.<br><br>**Recommendation:** Initially keep the default setting of `True` in case you want to use any of the features that rely on this data. | ■ True ■ False | True |
| ClayTablet. OnlyKeep TranslationData FromLatest Version | Determines whether the Connector keeps translation data only for the latest version of a content item.<br>■ To keep translation data only for the latest version of a content item, keep this setting as `True`.<br>■ To keep translation data for all versions of a content item, change this setting to `False`. | ■ True ■ False | True |
| ClayTablet. EmailNotification. SendEmail | Determines whether the Connector sends email notifications when it sends items out for translation or it receives translated items back from translation.<br>■ To receive email notifications, keep this setting as `True`.<br>■ To prevent receiving email notifications, change this setting to `False`. | ■ True ■ False | True |
| ClayTablet. EmailNotification. WaitMinutes | The Connector does not send a separate email notification for each item sent for translation.  This setting determines the interval, in minutes, that the Connector waits to send one notification email. That email contains information about all the items that were sent for translation since the previous notification. | integer | 4 |

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| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. EmailNotification. SmtpService | Determines which SMTP service the Connector uses to send notification emails:<br>■ `LocalSmtp`: The Connector uses the SMTP service on a local server to send emails.<br>■ `Gmail`: If your local server does not have an SMTP service, the Connector uses the free Gmail SMTP service to send emails. | ■ LocalSmtp<br>■ Gmail | LocalSmtp |
| ClayTablet. LOCAL.SMTP. Server | The IP address of the local SMTP service that sends notification emails. Relevant only if the value of the **ClayTablet.EmailNotification.SmtpService** setting, described above, is `LocalSmtp`. | an IP address | 127.0.0.1 |
| ClayTablet. LOCAL.SMTP. Port | The port number of the local SMTP service that sends notification emails. Relevant only if the value of the **ClayTablet.EmailNotification.SmtpService** setting, described above, is `LocalSmtp`. | a port number | 25 |
| ClayTablet. LOCAL.SMTP. EnableSSL | Determines whether the SMTP server uses SSL. | ■ True<br>■ False | False |
| ClayTablet. LOCAL.SMTP. FromAddress | The "From" email address that the local SMTP service uses to send notification emails. Relevant only if the value of the **ClayTablet.EmailNotification.SmtpService** setting, described above, is `LocalSmtp`. | an email address | CttNotification @Clay-Tablet.com |
| ClayTablet. LOCAL.SMTP. User | The username for authentication for the SMTP server, if required.<br>**Note:** To use SMTP authentication, uncomment this section. | username | blank |
| ClayTablet. LOCAL.SMTP. Password | The password for authentication for the SMTP server, if required.<br>**Note:** To use SMTP authentication, uncomment this section. | password | blank |

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| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. EmailNotification. NotifySentOut | Determines whether the Connector sends email notifications when it sends items out for translation.<br>■ To receive email notifications, keep this setting as `True`.<br>  **Note:** You must also set the **ClayTablet. EmailNotification.SendEmail** setting, described above, to `True`.<br>■ To prevent receiving email notifications, change this setting to `False`. | ■ True<br>■ False | True |
| ClayTablet. EmailNotification. NotifySentOut. Users.RoleName | The Connector sends email notifications when it sends items out for translation to all users that have been added to this role.<br>This role is installed by default.  You must add users to this role, or change the role name and this setting to fit your requirements. For information about roles, see "Configuring Connector Roles and Adding Users" on page 41. | a role name | sitecore\ Translation ItemSent Notification Receiver |
| ClayTablet. EmailNotification. NotifyCompleted | Determines whether the Connector sends email notifications when it receives translated items back from translation.<br>■ To receive email notifications, keep this setting as `True`.<br>  **Note:** You must also set the `ClayTablet.EmailNotification. SendEmail` setting, described above, to `True`.<br>■ To prevent receiving email notifications, change this setting to `False`. | ■ True<br>■ False | True |
| ClayTablet. EmailNotification. NotifyComplete d. Users.RoleName | The Connector sends email notifications when it receives translated items back from translation to all users that have been added to this role.<br>This role is installed by default.  You must add users to this role, or change the role name and this setting to fit your requirements. For information about roles, see "Configuring Connector Roles and Adding Users" on page 41. | a role name | sitecore\ Translation ItemCompleted Notification Receiver |
| ClayTablet. EmailNotification. NotifyErrors | Determines whether the Connector sends notification emails when an error related to a translation job. | ■ True<br>■ False | True |
| ClayTablet. EmailNotification. NotifyErrors. Users.RoleName | Sitecore users assigned to this role will receive notification emails. You can change the role name to fit your business, or you can add users to this default role. | | Translation Administrator (installed by the Connector) |

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| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet. PreventSenting ItemsWithout Workflow | Determines whether, when using the Bulk Translation wizard, the Connector sends out items for translation that are not assigned to a workflow.<br>■ If you set this value to `True`, then when using the Bulk Translation wizard to send out content for translation, the Connector does not send out items not assigned to a workflow.<br>■ If you set this value to `False`, then using the Bulk Translation wizard sends out all selected items for translation, even if they are not assigned to a workflow.<br><br>**Warning:** This creates a target version with source language content, which becomes publishable immediately. | ■ True<br>■ False | ■ `True` for new Connector installations<br>■ `False` for upgraded Connector installations |
| ClayTablet. PreviewURL | Determines whether to include a preview URL in the XML file, which enables translators and reviewers to preview the content. You can include the following parameters in the preview:<br>■ `{id}`: Sitecore item ID of the translated item.<br>■ `{version}`: The source version of the translated item.<br>■ `{lang}`: The source language of the translated item.<br>■ `{targetversion}`: The target version created as result of the translation.<br>■ `{targetlang}`: The target language for the translation.<br>■ `{jobid}`: The Connector translation job ID.<br><br>**Note:** You must replace `&` with `&amp`. Otherwise the configuration file will not be valid XML, for example:<br>`<setting name="ClayTablet.PreviewURL" value="http://www.yourcompany.com/preview?id={id}&amp;language={lang}&amp;version={version}&amp;jobid={jobid}" />`<br><br>**Note:** To configure this setting, uncomment this section. | | |

| Setting Name | Description | Supported Values | Default Value |
|---|---|---|---|
| ClayTablet.State ToAssignInBulk Translation | This setting determine the default state displayed in **Workflow Option: applied to all items selected > With state** dropdown list in the Translation Options page of the Bulk Translation Wizard. This is the default state to assign to source items without workflow state when sending them out for translation from the wizard. The default value points to the Review state in `CT3SampleWorkflow`, but you can change this to another state in that workflow or another workflow. | a workflow state | 4B7E2DA9-DE43-4C83-88C3-02F042031D04 |
| ClayTablet.Send JobMetadata | Determines the format for sending job metadata.<br>■ To send job metadata in a format compatible with the Connector for Sitecore version 3.6 or higher, set this value to `True`.<br>■ To send job metadata in a format compatible with the Connector for Sitecore version 3.5 or lower, set this value to `False`. | ■ True<br>■ False | ■ `True` for new Connector installations<br>■ `False` for upgraded Connector installations |
| ClayTablet. HeartBeat Interval InMinutes | Determines how frequently, in minutes, the Connector sends a heartbeat message to the Clay Tablet Platform that enables the Platform to monitor the health of the Connector. To disable the heartbeat, set this to zero (0). | integer | 30 |
| ClayTablet. Remove Control Characters | Some translation providers and translation management systems may not be able to handle control characters, such as `0X10` and `0X13`. They may treat an XML file with these characters as invalid. This option instructs the Connector to automatically remove all control (non-printing) characters (`0x00-0x1F`) from an XML file before sending it out for translation.<br>■ To automatically remove all control (non-printing) characters from an XML file before sending it out for translation, change this setting to `True`.<br>■ To keep all control characters in an XML file sent out for translation, keep this default setting of `False`. | ■ True<br>■ False | False |
| ClayTablet. Translate DisplayName | Supports sending out an item's display name for translation. | ■ true<br>■ false | false |

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## 4.5  Configuring Global Service Settings

The Connector has two scheduled services, the Upload Service, and Download Service, which are defined in Sitecore scheduling. These services upload files to and download files from the Clay Tablet Translation Platform.

The default polling interval for these services is 2 minutes. You can change this interval by modifying the following configuration file: `Website_root/Website/App_Config/Include/CT3Translation.config`. The duration of the interval is expressed as `hh:mm:ss`.

Running these services has minimal impact on the performance of the Clay Tablet Translation Platform server, because if there are no active jobs when they contact the server, they just wait until the next scheduled invocation before contacting the server again. If the network is unavailable temporarily, these services log error messages on each invocation.

| Setting Name | Description | Default Value |
| --- | --- | --- |
| ClayTablet.CT3Agent.UploadService, ClayTablet.CT2Agent | This agent polls for translation jobs to send to the Clay Tablet Platform. | 00:02:00 |
| ClayTablet.CT3Agent.DownloadService, ClayTablet.CT2Agent | This agent polls for translation jobs to retrieve from the Clay Tablet Platform. | 00:02:00 |

**Note:** To stop the Clay Tablet services from running, you can comment out the corresponding lines in the `CT3Translation.config` file.

**Note:** The Sitecore Scheduler controls all scheduled applications interacting with Sitecore, and therefore it schedules and triggers both these agents. The polling frequency of the agents cannot be more frequent than the Sitecore Scheduler's own frequency, because it will not have an impact.

Recommended polling intervals for these agents:

- Lowest = 1 minute
- Optimal = 5 minute

## 4.6  Configuring the Sitecore Languages in the Sitecore Content Editor

The Connector uses the **Regional ISO code** field of the language item in Sitecore to define the Connector language codes. You must set up the correct Connector language codes for every Sitecore language your company uses for translation, both source and target languages. The Connector language codes are in the following location in the delivery package: `<Delivery Package/Documents/CT3_LanguageCodes.txt>`.

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1. Log into the **Sitecore Content Editor** as an administrator.

2. Navigate to `sitecore/System/Languages`. This is where Sitecore languages are defined.

   **Note:** If a source or target language is not defined, you must add it to Sitecore. For detailed instructions, refer to the *Sitecore CMS Content Cookbook*. This guide is available in the documentation section of the Sitecore Developer Network (SDN) site, at http://sdn.sitecore.net/Reference.aspx. You must log in to this site to access the documentation.

3. For each source or target language, in the **Regional Iso Code field**, enter the Connector language code from the `<Delivery Package/Documents/CT3_LanguageCodes.txt>` file.

**Note:** The Connector includes error trapping for improperly configured language codes. If you make a mistake or forget to configure a language, when you try to send out content for translation, the language is not available for selection, and the `CT Language code is misconfigured` error is displayed beside the language.

### 4.6.1 Adding Custom Language Codes to Sitecore

You can also add custom language codes into Sitecore by editing the `Website/bin/CTAddedLanguageCodes.xml` file. However you must also contact Clay Tablet and your translation provider to ensure the custom languages are set up appropriately in the Clay Tablet Provider Connector as well as in the Translation Management systems.

**Note:** If your company sends content to your translation provider via the Clay Tablet FTP Connector on the translation side, it is not necessary to contact Clay Tablet, because the FTP Connector automatically creates folders based on the project name and language pairs, even for a custom language pair. However, you must inform your translation provider about the standard language code into which to translate the content.

## 4.7 Configuring the Translation Workflow

Sitecore uses workflows to control when a content item is published. The Connector uses workflows to control the translation process for a content item.

The Connector translation package installs a sample translation workflow, which you access in the Sitecore Content Editor as an administrator by navigating to `sitecore/System/Workflows/CT3 Sample Workflow`. Although you use this workflow to manage translation, you can duplicate, modify, or extend it to support additional requirements.

For general information about workflows, refer to the appropriate version of the *Sitecore CMS Content Author's Reference and Cookbook*. This guide is available in the documentation section of the Sitecore Developer Network (SDN) site, at http://sdn.sitecore.net/Reference.aspx. You must log in to this site to access the documentation.

The Connector supports translating Sitecore items that have been configured in the following ways:

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- with the Connector Sample workflow attached

- with a custom workflow that includes the Connector configuration section and the associated workflow states, which are listed and described in "Connector Workflow States" on page 32

- with a custom workflow that does not have the Connector configuration section (see the following notes)

- without a workflow (see the following notes)

**Note:** You can use the Bulk Translation feature to submit all the above types of item for translation. However, if you want to send items for translation individually, the **Translate** button in the **Workflow** section of the **Review** tab is displayed only for Sitecore items attached to the CT3 Sample workflow or to another workflow whose base template is `TranslationWorkflow`, as described in "Using your own Workflow for Translation" on page 33.

**Note:** You *must* use a translation workflow that includes the basic Connector translation steps, which are implemented through workflow states. This ensures that the Connector can send out your content and retrieve it from your translation provider(s). For information on Connector workflow states, see "Connector Workflow States" on page 32.

To configure the following settings, navigate to `sitecore/System/Workflows/CT3 SampleWorkflow` or your designated translation workflow.

**Tip:** Hover over each setting for extended help text.

You use the following settings to configure a workflow and the items attached to the workflow:

**Note:** For instructions on attaching items to a workflow, refer to the *Clay Tablet Connector User Guide, Special Edition for use with Lionbridge Freeway*.

| Parameter | Description | Default Value |
|---|---|---|
| Field Types to be Sent For Translation | Determines which types of fields the Connector can send out for translation when it sends an item for translation. This is relevant for all templates. If you create a custom field type, you must add it to this list so that you can send it out for translation. <br><br>**Note:** You cannot set `Shared Fields` to be sent out for translation, because these fields are shared across all versions and languages of an item. <br><br>To change these fields, click the **Edit** button above the list. In the dialog box that opens, select the field types to add, and use the blue arrow to copy them to the **Selected** column. When you are done, click **OK**. <br><br>**Tip:** You can use the `Shift` key to select multiple adjacent field types. | By default, the Connector sends out fields of the following field types for translation:<br>- text<br>- Rich Text<br>- html<br>- Single-Line Text<br>- Multi-Line Text |

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| Parameter | Description | Default Value |
|---|---|---|
| Translate From (Source Language) | The source language from which to translate the items. Select a language from the list. | Usually this is the Sitecore default language. |
| Translate To (Target Language) | The target languages that are available for translating the items attached to the workflow. To translate into specific target languages, select the corresponding check boxes. | n/a |
| Synchronize Translation (detect changed content and resend) | Determines whether the SyncTranslation feature is available when translating items attached to this workflow. This feature checks each field of the source version for any content changes, and it sends *only* changed content fields out for translation, to ensure that all target versions reflect these changes.<br>■ When this check box is selected, you can activate this feature by selecting a check box in either the **Bulk Translation** wizard or the **Automatic Item Export for Translation** dialog box. The SyncTranslation feature may reduce translation costs, but it needs the Connector translation backup data, and it increases the Connector processing time before the Connector sends out the items for translation.<br>■ When this check box is cleared, you cannot activate this feature, because the related user interface is not displayed. The Connector sends all specified source content for translation, even if it has not changed since it was previously sent for translation. | check box is cleared |
| Requested Translation Timeframe (Days) | Determines the translation deadline when sending out the translation automatically, without using the user interface that supports entering this information in the **Delivery Date** field. This information is sent to the translation provider as metadata of the translation package. If you set this parameter to 14, the deadline will be two calendar weeks after you submit an item for translation.<br><br>**Recommendation:** Discuss whether to use this feature with your translation provider(s). | 15 |
| Workflow State to set when Sending Content for Translation | The workflow state to set when a source item has been selected for translation. | /sitecore/system/ Workflows/CT3 Sample Workflow/ Sending for Translation |

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| Parameter | Description | Default Value |
|---|---|---|
| Workflow State to set (for Source Content) once content has been sent for translation | The workflow state to set for a *source* item after the Connector has sent it out for translation. For example, in some companies, when you send out the content for translation, the *source* is ready for publishing. In this scenario, you can set this state to `Done`, which is a publishable state. Alternatively, if your company has a final review process, you can set this to another state that is not publishable. | By default, this state is not set, so the source item's state does not change when you send it out for translation. |
| Workflow State to set for Content while it is out for translation | The workflow state to set for *target content* when an item is being translated. The default `In Translation` workflow state enables you to see which items are still out for translation. It facilitates following up with your translator about items that you have sent out for translation, but that you have not yet received back. | /sitecore/system/ Workflows/CT3 Sample Workflow/In Translation |
| Workflow State to set when a translation process has been cancelled | The workflow state to set when an item's translation request has been cancelled.<br><br>A user can cancel translation from the Translation Queue. A translation request is automatically cancelled if a fatal error occurs while sending out an item for translation, such as an incorrect language code, or insufficient user permissions. | /sitecore/system/ Workflows/CT3 Sample Workflow/ Reviewing |
| Workflow State to set when content Translation is complete | The workflow state to set when an item translation has been completed, and it is back in Sitecore for review and publishing. | /sitecore/system/ Workflows/CT3 Sample Workflow/ Editing Translated Version |

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| Parameter | Description | Default Value |
|---|---|---|
| Send Content automatically using pre-configured language settings | Enables sending all items to the Translation Queue without further user action. That is, the Connector automatically uses the **Translate from**, **Translate to** and **Requested Translation Timeframe** information, defined above, to immediately send content to the Translation Queue without enabling the user to change these parameters: the Language Selection pop-up window does not open.<br>■ If this check box is selected, the **Language Selection** pop-up window does not open when you send content to the Translation Queue: you cannot select the target languages or the destination, but sending items for translation is streamlined.<br>■ If this check box is cleared, the **Language Selection** pop-up window opens when you send content out for translation: you can select the target languages, so the process is less streamlined. However, this provides greater control for the user. | check box is cleared |
| Send Content immediately, skipping the Translation Queue | The Connector separates the process of sending an item for translation into two steps, which enables a company to set up user permissions for each step based on its own translation business logic:<br><br>1.  Adding the item to the Translation Queue.<br><br>2.  Sending out the queued items from the Translation Queue.<br><br>This setting enables a user to skip the queuing step and send out an item for translation immediately.<br><br>**Recommendation:** Select this check box only if content editors are allowed to incur translation costs, because the Connector sends out content without further review or approvals.<br><br>■ If this check box is selected, the Connector sends out items for translation immediately, bypassing the Translation Queue.<br>■ If this check box is cleared, the Connector sends items to the Translation Queue before it sends them out for translation.<br><br>**Important:** This parameter is not currently supported. | check box is cleared |

| Parameter | Description | Default Value |
|---|---|---|
| Automatically Publish content when it reaches the Final State | Determines whether the Connector automatically publishes the content when an item reaches the final state of the translation workflow.<br>■ If this check box is selected, the Connector automatically publishes the content when an item reaches the final state.<br>■ If this check box is cleared, the Connector does not automatically publish the content when an item reaches the final state. | check box is selected |
| Publish to which Database? | The target databases for publishing content if the Connector needs to publish an item. | n/a |
| Publish child items? | Determines whether the Connector publishes child items when it publishes their parent item.<br>■ If this check box is selected, the Connector publishes child items when it publishes their parent item.<br>■ If this check box is cleared, the Connector does not publish child items when it publishes their parent item. | check box is selected |

For a list and description of Connector workflow states, see "Connector Workflow States", below.

## 4.7.1 Connector Workflow States

The `sitecore/System/Workflows/CT3 SampleWorkflow` workflow contains all required states for the Connector translation management process.

By default, it has the following seven states, which are listed, in order, below. Your company can modify this translation workflow to meet your business requirements. Your company can also create your own translation workflow, removing some of these states or adding additional states as required.

| Workflow State | Relevant for Source Content | Relevant for Target Content |
|---|---|---|
| Editing | ✓ | |
| Reviewing | ✓ | |
| Sending for Translation | ✓ | |
| In Translation | | ✓ |
| Editing Translated Version | | ✓ |
| Reviewing Translated Version | | ✓ |
| Done | ✓ | ✓ |

**Note:** Only content in the `Done` state is publishable.

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### Source content

A source content item can move through the workflow in several different ways, depending on the configuration, which depends on your company's translation processes:

#### Example 1

Editing > Reviewing > Sending for Translation > Done

#### Example 2

Editing > Reviewing > Sending for Translation > Reviewing > Done

### Target content

Similarly, a target content item can move through the workflow in several different ways, depending on the configuration, which depends on your company's translation processes:

#### Example

In Translation > Editing Translated Version > Reviewing Translated Version > Done

**Note:** When the state of a target content item is `In Translation`, that content is a copy of the source language item. Users can use the `In Translation` and `Editing Translated Version` workflow states to keep track of which translations have returned and which are still pending.

## 4.7.2  Using your own Workflow for Translation

If you want to use your own workflow for translation, you must change its base template to `/sitecore/templates/System/Workflow/TranslationWorkflow`, so that it will include the Connector options, described below.

**Note:** Your own custom workflow must include the required translation statues.

To change the base template of your workflow, so that you can use it with the Connector to manage translations:

1.  In the navigation pane, select your workflow that you want to use as a translation workflow. For example, select `sitecore\System\Workflow\MyWorkflow`.

2.  In the ribbon, click the **Configure** tab.

3.  In the **Template** section of the Configure tab, click **Change**.

    The Change Template Wizard Welcome page opens.

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4.   Click **Next**.

5.   In the Select the Template page of the wizard, navigate to `Templates\System\Workflow\TranslationWorkflow`, and click **Next**.
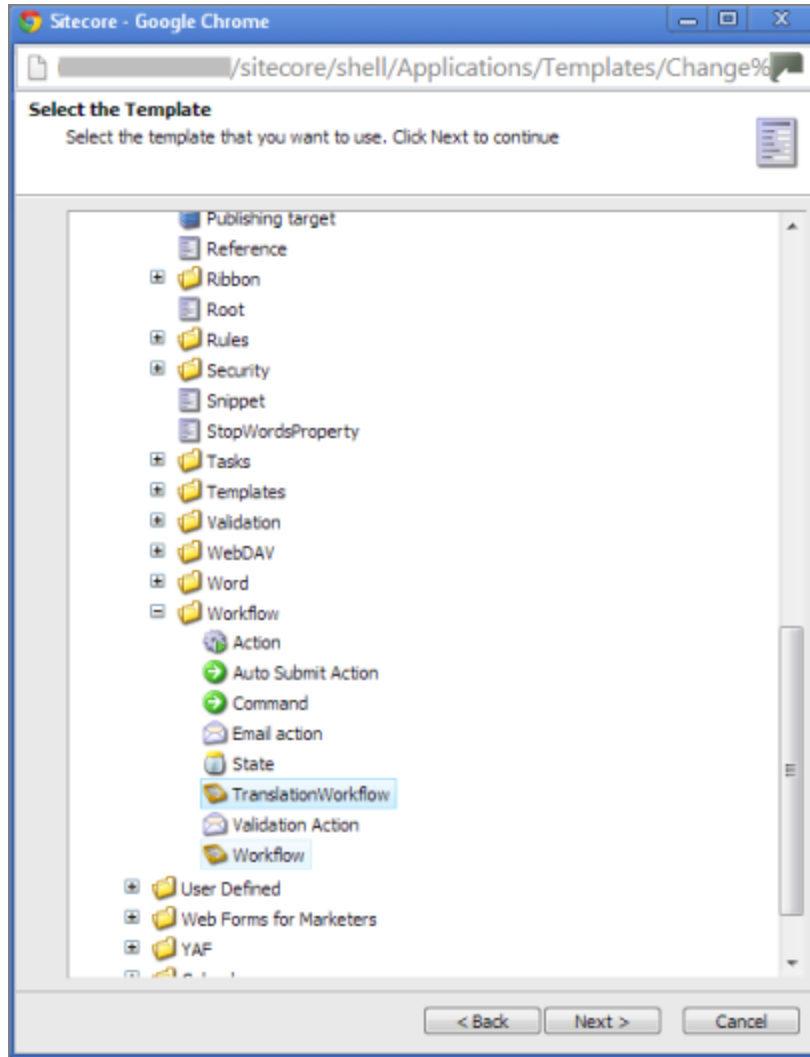


6.   In the Change page of the wizard, click **Next** to confirm this change.

7.   Click **Finish**.

## 4.8 Filtering Fields in Items that Do Not Need Translation

You can use the **Translation Filter** window to filter out fields that never need translation. You can access this feature from either the **Sitecore Content Editor** or the **Sitecore Desktop**.

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You initially specify which types of fields the Connector sends for translation using the **Field Types to be Sent For Translation** workflow-level parameter. For details, see "Configuring the Translation Workflow" on page 27.

You use the Translation Filter feature to further exclude certain types of fields from content that the Connector sends for translation, per the template. You can create filters when initially configuring the Connector, or you can create or update the filters at any time.

When a user sends out an item for translation, the Connector collects the content from all fields in the item with the field types specified in that parameter, in preparation for sending them out for translation. Then, if there are some fields that you do not want to send for translation, even though they belong to field types that the Connector sends out for translation, you can use the Translation Filter to exclude them.

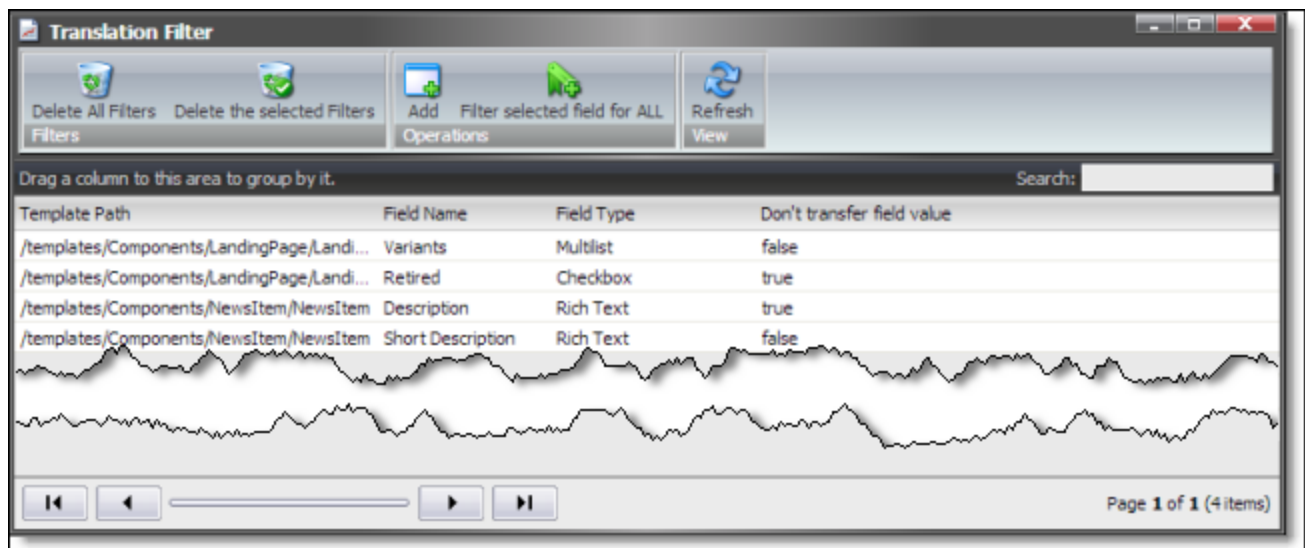1.  Do one of the following to open the **Translation Filter** window:

    ▦  In the Sitecore Content Editor ribbon, click the **CTC Translation** tab, and then in the **Translation Tools** section, click **Translation Filter**.
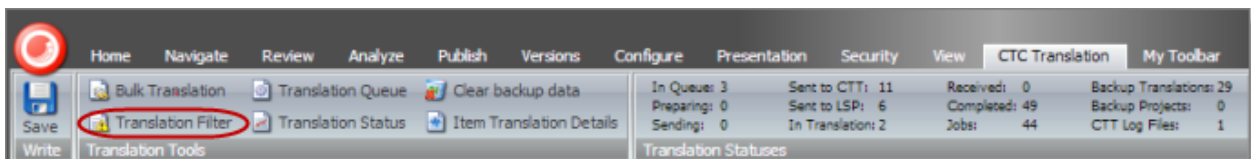


    ▦  In the Sitecore Desktop, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Filter** from the menu.

    The **Translation Filter** window opens.

    ▦  If you use the Sitecore Content Editor, it opens in a separate browser window.

    ▦  If you use the Sitecore Desktop, it opens in the same browser window.
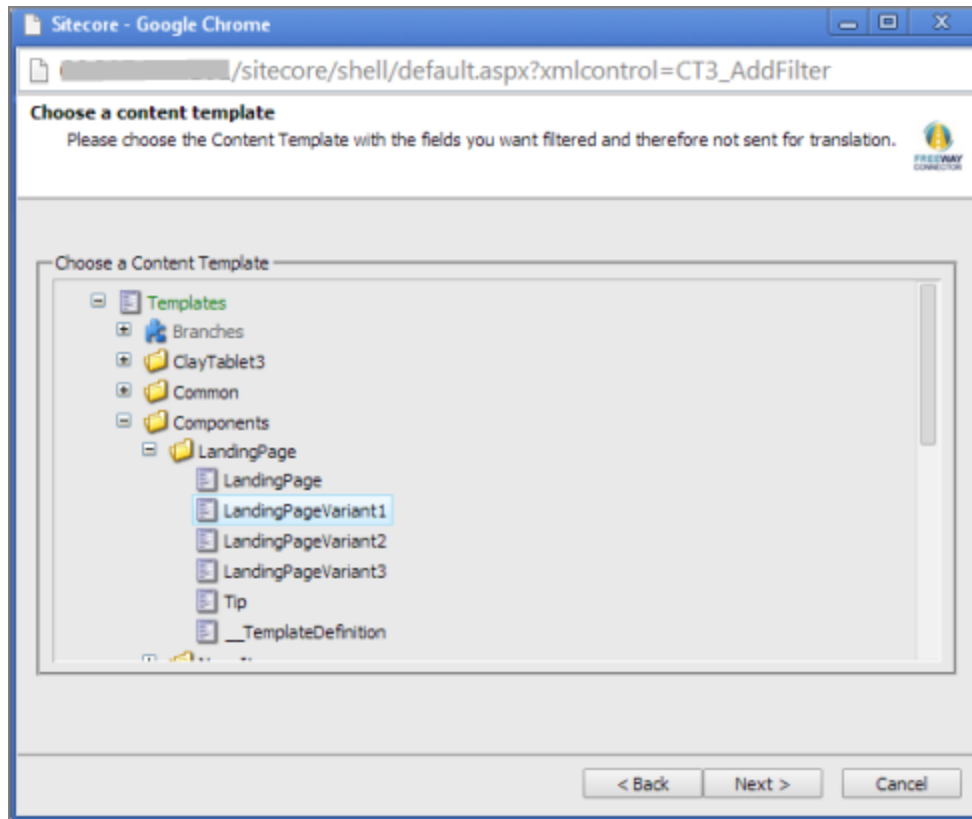


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2.  Click the **Add** button ![Add] to add a new filter.

    The **Welcome** page of the **Field Filter** wizard opens.
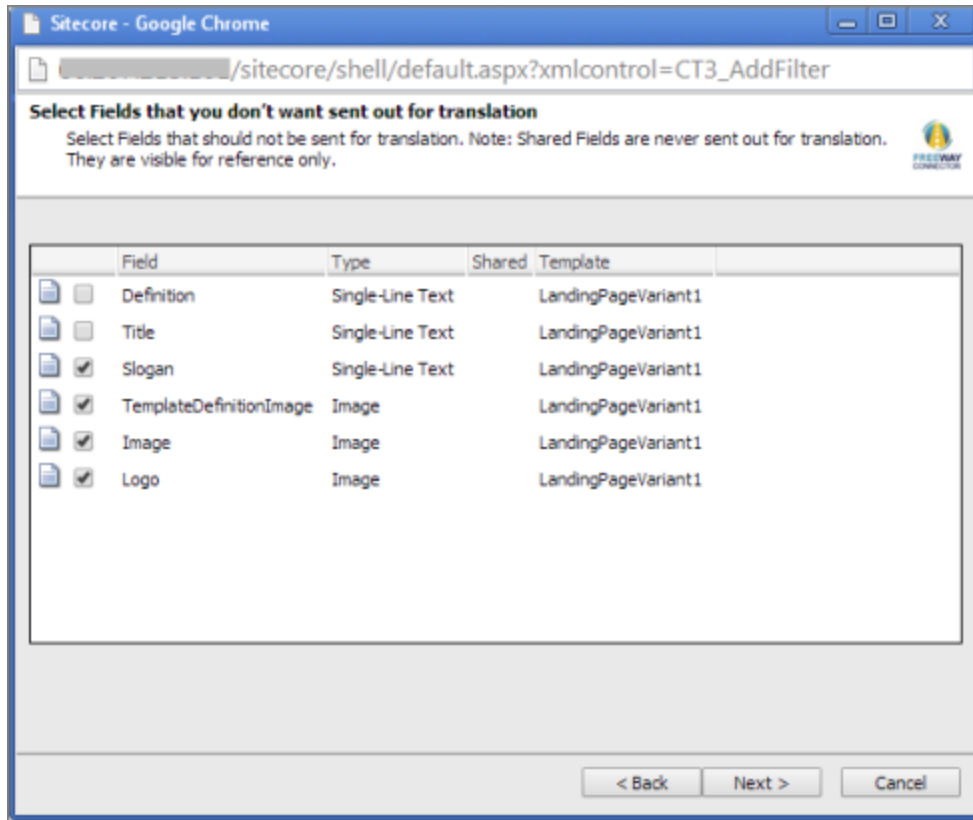
3.  Click **Next**.

    The **Choose a Content Template** page of the **Field Filter** wizard opens.



4.  Select the content template to associate with the fields you want to filter, and exclude from translation. Use the Expand ⊞ and Collapse ⊟ icons to navigate the tree. Click **Next**.

    The **Select Fields that you don't want sent out for translation** page of the **Field Filter** wizard opens.

This page displays the following information about all the fields in the template you selected:

| Column | Description |
|---|---|
| Field | The name of a field type in the template. |
| Type | The description of the field type. |
| Shared | Indicates whether the field type is shared. |
| Template | The template where the field type is located. |

5.  Select the check boxes of the field types you want to exclude from translation, and click **Next**.

**Note:** Shared fields are never sent for translation, so they are automatically excluded from translation. You do not need to select them.

The **Don't transfer field value** page of the **Field Filter** wizard opens.
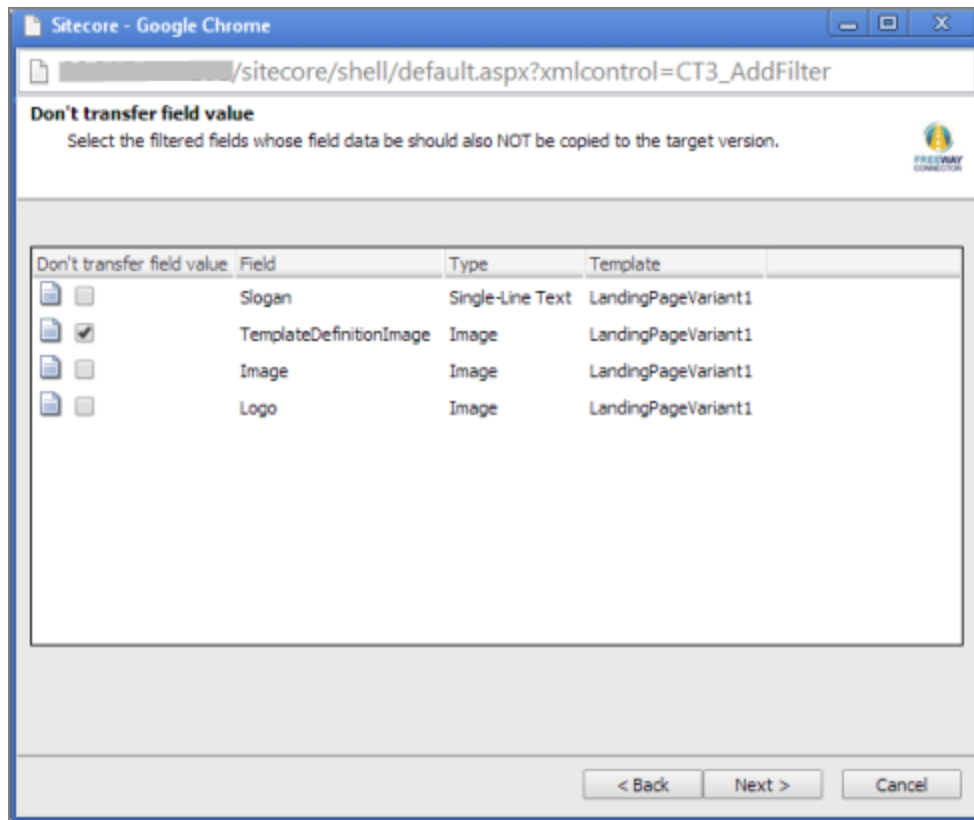
This page displays only the field types you selected in the previous page of the wizard.

6.  For each field type, indicate whether you want the Connector to copy the source-language content to the target version.

   ▦  If you want the Connector to copy the source-language content of a field type to the target version, select the corresponding check box. This field type will be included in the target content; however, the content will be in the source language.

   ▦  If you do not want the Connector to copy the source-language content of a field type to the target version, clear the corresponding check box. This field type will be excluded from the target content.

Click **Next**.

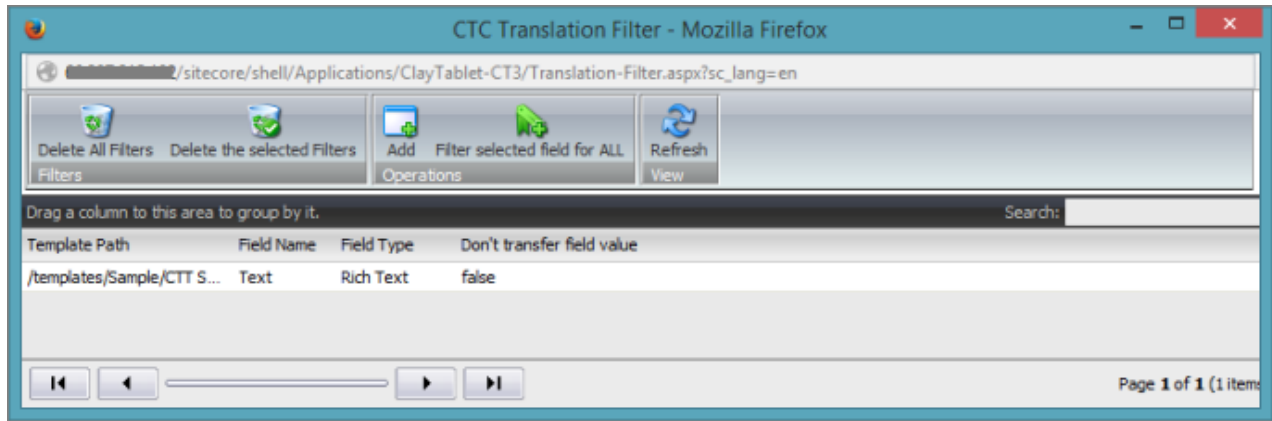The summary page of the wizard opens.
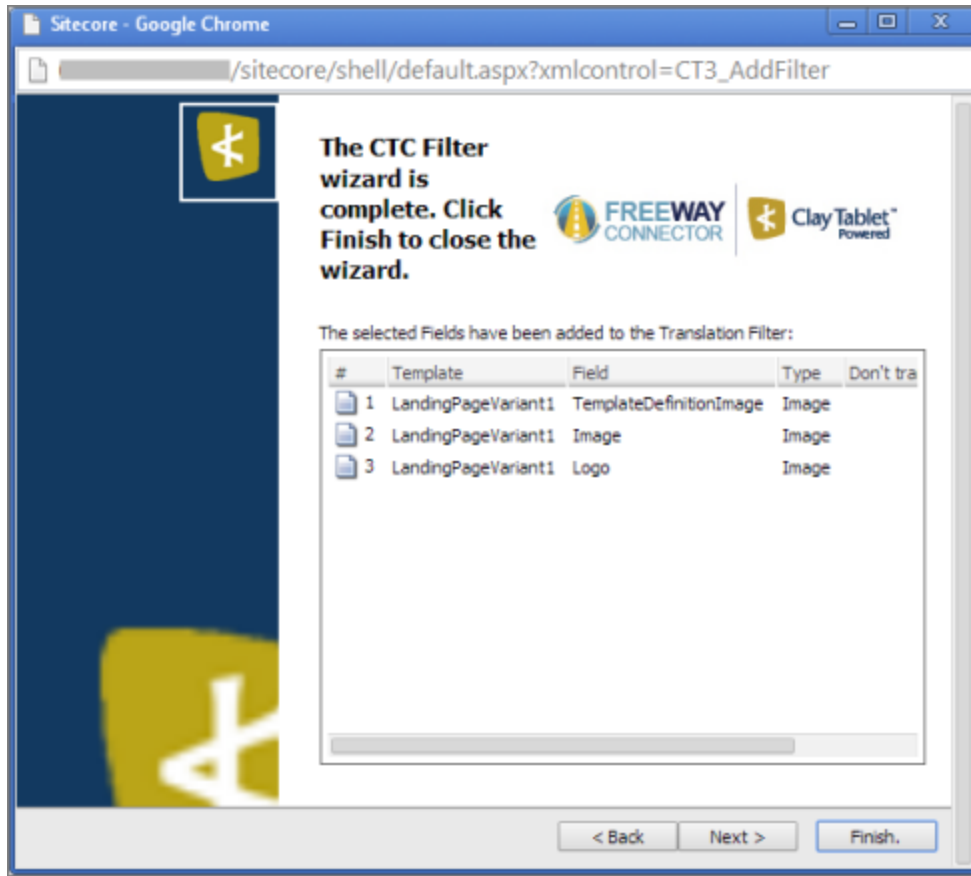
This page displays the following information about the fields to exclude in the new filter.

| Column | Description |
|---|---|
| Template | The name of the template where the field type to exclude from translation is located. |
| Field | The name of the field type to exclude from translation. |
| Type | The type of field to exclude from translation. |
| Don't transfer field value | Indicates whether the Connector copies the source-language content to the target version for this field type.<br><br>■ Blank indicates that the Connector *does* copy the source-language content of a field to the target version, select the corresponding check box. This field will be included in the target content; however, it will be in the source language.<br><br>■ `yes` indicates that the Connector *does not* copy the source-language content of a field type to the target version. The Connector does not automatically transfer the value of the field in the source version to the field in the target version. |

7.  Click **Finish**.

The wizard closes, and the **CTC Translation Filter** window displays each filter you created in a separate row:

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This window displays the following information about the filters:

| Column | Description |
|---|---|
| Template Path | The path and name of the template. Field types in this template can be excluded from translations. |
| Field Name | When the Connector sends out content items based the specified template for translation, it does not send out this field's content for translation. |
| Field Type | The type of this field to exclude from translation. When `[ALL]` is displayed, then all types of this field are excluded from translation. |
| Don't transfer field value | Indicates whether the Connector copies the source-language content to the target version for this field type.<br>■  `false` indicates that the Connector *does* copy the source-language content of a field type to the target version, select the corresponding check box. This field will be included in the target content, however it will be in the source language.<br>■  `true` indicates that the Connector *does not* copy the source-language content of a field to the target version. The Connector does not automatically transfer the value of the field in the source version to the field in the target version. |

Now that you have created a filter, you can perform the following actions in the **CTC Translation Filter** window (in addition to the **Add Filter** button, which was described above in step 3):

| Button | Description |
|---|---|
|  | Deletes all filters displayed in the CTC Translation Filter window. |
|  | Deletes all selected filters from the CTC Translation Filter window. |
|  | Applies the selected filter to all templates with the same field type. |

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| Button | Description |
|--------|-------------|
| Refresh | Refreshes the list of displayed filters. |

## 4.9  Configuring Connector Roles and Adding Users

The Connector installs the roles described below into Sitecore:

| Role | Description |
|------|-------------|
| sitecore\Translation Administrator | Users added to this role can set translation filters, remove completed project status, and delete the Connector backup data. Users can submit content to the translation queue or send it out immediately to translation. |
| sitecore\Translation Operator | Users added to this role can submit content to the translation queue. They can also send items from the queue for translation and remove items from the queue. When using the Bulk Translation feature, these users can skip the translation queue. They cannot send out individual content items directly to translation. |
| sitecore\ Translation ItemSent Notification Receiver | Users added to this role receive email notifications from the Connector when it sends items out for translation. |
| sitecore\ Translation ItemCompleted Notification Receiver | Users added to this role receive email notifications from the Connector when it receives translated items back from translation. |

You must assign your users to these roles so they can access the functionality described above. For detailed instructions, refer to the *Sitecore CMS Security Administrator's Cookbook*. This guide is available in the documentation section of the Sitecore Developer Network (SDN) site, at
http://sdn.sitecore.net/Reference.aspx. You must log in to this site to access the documentation.

## 4.10  Configuring your Freeway Login Credentials

If the Connector is configured with your Freeway login credentials, then when you send content for translation, the Connector automatically retrieves the analysis codes set up for your company in Lionbridge. When you submit content for translation to Freeway, you can select the appropriate analysis codes. This determines how Lionbridge processes your company's translation projects.

After you install the Connector package:

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1. Open the following file with a text editor: `Website\App_Config\Include\Freeway.config`.

2. Enter your client-specific values for the following parameters: `Freeway.ServerURL`, `Freeway.LoginName`, and `Freeway.LoginPassword`.

**Warning:** This configuration is required for full integration between the Connector and Freeway. Otherwise, the Connector cannot retrieve and display analysis code options, and the user cannot specify analysis codes for projects submitted to Freeway. However, even without this configuration, the Connector can still send submitted content to Freeway.

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# 5 Installing the Enhanced Workbox

Clay Tablet provides an optional enhanced Workbox, which has more features than the standard Sitecore Workbox. Installing Clay Tablet's enhanced Workbox updates and replaces the original Sitecore Workbox.

This Workbox supports much more powerful management of large lists of items in a workflow. You can sort by different column headings, approve many items at once and manage the display of long lists easily.

**Important:** Install Clay Tablet's enhanced Workbox only if you are comfortable with replacing the standard Sitecore Workbox.

To install the enhanced Workbox:

1. On the Sitecore Desktop, on the Windows Start menu, select **Sitecore > Development Tools > Installation Wizard**.

   The **Welcome** page of the **Sitecore Install Package** wizard opens.

2. Click **Next**.

   The **Select Package** page of the **Sitecore Install Package** wizard opens.

3. Click **Browse**, and locate the Workbox installation package, `CT3_64x.y.z_Sitecore6.4_Workbox_update-3.64.x.y.z.zip`, where *x.y.z* is the current version number of the Connector for Sitecore.

   **Tip:** The installation package was in the following location in the delivery package: `<Delivery Package/Workbox/CT3_64x.y.z_Sitecore6.4_Workbox_update-3.64.x.y.z.zip>`.

4. Click **Upload** to upload the package.

5. After the package is uploaded, click **Next**.

6. Follow any on-screen instructions to finish installing the Workbox package into Sitecore.

7. On the Sitecore server, navigate to the `Web.config` file and open it in a text editor. For example, the location of this file may be `C:\inetpub\wwwroot\Sitecore66\Website`.

8. Search for `workflowProvider`.

   **Note:** There are two places where `workflowProvider` is configured, one for the `core` database (in the section starting with `<!-- core -->`), and the other for the `master` database (in the section starting with `<!-- master -->`),. You change only the `workflowProvider` section for the `master` database.

9. Comment out the `workflowProvider` section for the `master` database.

10. Add the following section instead:

```
<workflowProvider hint="defer"
type="Sc.ClayTablet.WorkboxEx.SortingWorkflowProvider, Sc.ClayTablet.WorkboxEx">

   <param desc="database">$(id)</param>
```

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```
    <param desc="history store" ref="workflowHistoryStores/main" param1="$(id)"/>
  </workflowProvider>
```

11. Verify that after editing, the relevant section in the `web.config` file is similar to the following:

```
<database id="master" singleInstance="true" type="Sitecore.Data.Database,
Sitecore.Kernel">
......
  <!--
  <workflowProvider hint="defer
              type="Sitecore.Workflows.Simple.WorkflowProvider,
              Sitecore.Kernel">
    <param desc="database">$(id)</param>
    <param desc="history store" ref="workflowHistoryStores/main" param1="$(id)
                "/>

  </workflowProvider>
  -->

  <workflowProvider hint="defer"
              type="Sc.ClayTablet.WorkboxEx.SortingWorkflowProvider,
    Sc.ClayTablet.WorkboxEx">
    <param desc="database">$(id)</param>
    <param desc="history store" ref="workflowHistoryStores/main" param1="$(id)
    "/>
  </workflowProvider>
  .......
```

12. Save the `web.config` file.

    Sitecore restarts.

    For information on using the enhanced Workbox, refer to the *Clay Tablet Connector for Sitecore User Guide*.

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# 6  Pre-Production Testing

After you complete the configuration, your Clay Tablet Connector for Sitecore installation is ready for testing. We recommend sending only a few pages for translation in one language as an initial test. For detailed instructions, refer to the *Clay Tablet Connector for Sitecore User Guide, Special Edition for use with Lionbridge Freeway*. Once successful, you can send as many languages as required.

Please coordinate with your translation provider for this test process.

If you have any concerns or questions, please contact Clay Tablet Support. For details, see "How to Contact Clay Tablet Support" on page 8.

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# 7  Appendix – Connector Translation File Formats

## 7.1  XML Translation File – New Translation

The following is an example of new content that the Connector sends for translation:

```
<TranslationContent CT2ProjectId="5ab2e78e-e427-4b89-9629-562c13584d94"
CT2AssetId="9250c3ee-da56-47d8-880e-2514052d7a58" CT2SourceLanguageCode="en-US"
CT2TargetLanguageCode="fr-FR" SitecoreSourceLanguageCode="en"
SitecoreTargetLanguageCode="fr-FR">

  <SitecoreItem DatabaseName="master" ItemId="{E6F3AA2D-3E5B-47A5-8B4A-
  1EA603C9A3FA}" ItemSourceVersion="1" ItemTargetVersion="1"
  TranslationDeadline="">

    <FieldContent FieldName="Title">Demo content to translate</FieldContent>

    <FieldContent FieldName="Body">

      &lt;p&gt;This is content that google will try to translate&lt;/p&gt;

    </FieldContent>

  </SitecoreItem>

</TranslationContent>
```

## 7.2  HTML Translation File – New Translation with Metadata in Comments

The following is an example of new content that the Connector sends for translation, with metadata in the comments:

```
<!--CT2Translation:[From:en-US To:fr-FR]-->

<!--CT2SharedMeta:92d2c042-2bcf-41cd-8a04-fe4d327f2157|45525ffe-fdf1-403f-be6a-
43bcd99e3373|en|fr-FR|en-US|fr-FR:SharedMetaEnd-->

<!--CT2FieldMeta:master|{C069745D-63F6-4EB1-868F-EF1AE7C0BB76}|2|10|Title:Begin-->

Title of demo2

<!--CT2MetaField::End-->

<!--CT2FieldMeta:master|{C069745D-63F6-4EB1-868F-EF1AE7C0BB76}|2|10|Body:Begin-->

<p> Body of demo2 </p>

<!--CT2MetaField::End-->
```

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## 7.3  XML Translation File – Correction Requested

The following is an example of a request to correct the translation:

```
<TranslationCorrectionContent CT2ProjectId="3149ca06-64f8-4e07-afb1-57a7c3539670"
CT2AssetId="08a44fe1-a650-4dc7-bca5-c63e6cd0a4f7" CT2SourceLanguageCode="en-US"
CT2TargetLanguageCode="el-GR" SitecoreSourceLanguageCode="en"
SitecoreTargetLanguageCode="el-GR" DatabaseName="master" ItemId="{6C95A5D0-30D1-
4329-95BD-E9C8FF71FD07}" ItemSourceVersion="1" ItemTargetVersion="4">

   <Notes>

   </Notes>

   <ItemFields>

      <ItemField FieldName="Title">

         <SourceContent>Smartphone traffic is up 193% in a year</SourceContent>

         <TargetContent>Smartphone κίνηση είναι επάνω 193% σε ένα
         χρόνο</TargetContent>

      </ItemField>

   </ItemFields>

</TranslationCorrectionContent>
```

## 7.4  HTML Translation File – Correction Requested with Metadata in Comments

The following is an example of a request to correct the translation with metadata in the comments:

```
<!--CT2TranslationCorrection:[From:en-US To:de-DE]-->

<!--CT2SharedMeta:95e71b0c-5e75-4a34-8cf7-e706d7edff2d|f366b6e9-78c9-438a-b67a-
37a938257889|en|de-DE|en-US|de-DE:SharedMetaEnd-->

<!--CT2ItemMeta:master|{333E5B70-BA26-402B-A3CE-5A5FBAFF7D66}|4|9:ItemMetaEnd-->

<!--CT2Note::Begin-->

The translation of the title needs correction

<!--CT2Note::End-->

<!--CT2FieldMeta:Title:Begin-->

<!--Source Content::Begin-->

Smartphone traffic is up 193% in a year

<!--Source Content::End-->

<!--Translated Content::Begin-->

Smartphone-Verkehr ist bis 193% in einem Jahr

<!--Translated Content::End-->

<!--CT2MetaField::End-->
```

## 7.5  Translation Memory update file

In the following example, a user corrected the translation and it must be sent back to the translation provider to update the remote translation memory (TM):

```
<UpdateTMContent CT2SourceLanguageCode="en-US" CT2TargetLanguageCode="da-DK"
SitecoreSourceLanguageCode="en" SitecoreTargetLanguageCode="da-DK">

  <ContentCorrections>

    <ContentCorrection>

      <SourceContent>Smartphone traffic is up 193% in a year</SourceContent>

      <TargetContent>Smartphone trafik er op 193% på et år</TargetContent>

    </ContentCorrection>

    <ContentCorrection>

      <SourceContent>

        &lt;p&gt;Smartphone traffic is up. Feature phone share is down. And
        traffic from mobile Internet devices (like the iPod touch) that don't
        have built-in phones is booming — even before Apple releases the
        iPad.&lt;/p&gt;

        &lt;p&gt;That's the thrust of the the latest report by AdMob, the mobile
        advertising network snapped up last fall by Google (&lt;a
        href="http://money.cnn.com/quote/quote.html?symb=GOOG"
        rel="external"&gt;GOOG&lt;/a&gt;) before Apple (&lt;a
        href="http://money.cnn.com/quote/quote.html?symb=AAPL"
        rel="external"&gt;AAPL&lt;/a&gt;) could buy it.&lt;/p&gt;</SourceContent>

      <TargetContent>&lt;p&gt; Smartphone trafik er op. Feature telefon andel er
      nede. Og trafik fra det mobile internet-enheder (ligesom iPod touch), der
      ikke har indbygget telefoner boomer - selv før Apple frigiver IPAD.
      &lt;/p&gt;&lt;p&gt; Det er essensen af den seneste rapport fra admob, det
      mobile annoncenetværk snapped op sidste efterår af Google ( &lt;a
      href="http://money.cnn.com/quote/quote.html?symb=GOOG"
      rel="external"&gt;GOOG&lt;/a&gt; ) før Apple ( &lt;a
      href="http://money.cnn.com/quote/quote.html?symb=AAPL"
      rel="external"&gt;AAPL&lt;/a&gt; ) kunne købe det.
      &lt;/p&gt;</TargetContent>

    </ContentCorrection>

  </ContentCorrections>

</UpdateTMContent>
```

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