



XTM Connect -  
Microsoft Excel in Office 365

Published by XTM International Ltd.

© Copyright XTM International Ltd. All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, including photocopying, without the written permission of XTM International Ltd.

May 2020

## Table of Contents

---

<b>Table of Contents</b>	<b>3</b>
<b>1. Introduction</b>	<b>4</b>
<b>2. Technical requirements</b>	<b>4</b>
<i>Supported platforms</i>	4
<b>3. Configuration</b>	<b>4</b>
<i>Installing the XTM Connect Add-in</i>	4
Manual installation and configuration	4
Getting the XTM Connect Add-in	9
<i>Connecting to XTM</i>	11
XTM Connect options	13
<b>4. Translation workflow</b>	<b>16</b>
<i>Translation of columns</i>	16
Sending columns for translation	16
<i>Translation of whole spreadsheets</i>	19
Sending spreadsheets for translation	19
<i>Handling of metadata</i>	20
Sending content with metadata for translation	20
<i>Monitoring of target text length</i>	22
Sending content with character limits set for the target cell	22
<i>Retrieving translation from XTM</i>	23
<b>5. Translation workflow in XTM</b>	<b>25</b>
<i>Cancelling projects in XTM</i>	25
<b>6. Desktop application</b>	<b>25</b>

## 1. Introduction

---

XTM Connect - Microsoft Excel in Office 365 is an Excel add-in developed by XTM International Ltd. to provide a connection between XTM Cloud and both – online and desktop Excel spreadsheets. The configuration of translation projects takes place within XTM. Users can create projects within desktop or online Excel workbook, send them over to XTM for translation, and receive translation back to their Excel sheets.

The add-in requires purchasing an Office 365 subscription, setting up an account on Office page and having Microsoft Excel with the Microsoft Office bundle installed on your PC.

Have a look at the full XTM Excel integration in the video from XTM webinar:  
[https://www.youtube.com/watch?v=Ywk\\_aj38r5M&feature=youtu.be](https://www.youtube.com/watch?v=Ywk_aj38r5M&feature=youtu.be)

For installation queries and troubleshooting, contact us: <https://support.xtm-intl.com/en/support/home>.

## 2. Technical requirements

---

### Supported platforms

#### Supported platforms:

- Microsoft Office for the web
- Microsoft Office for Windows (requires Office 365 subscription) [Version 1907 (Build 11929.20306) or later]
- Microsoft Office 2019 for Windows (one-time purchase) [Version 1907 (Build 11929.20306) or later]
- Microsoft Office for Mac (requires Office 365 subscription) (Version 16.30 or later)

#### Unsupported platforms:

- Microsoft Office 2016 for Windows (one-time purchase)
- Microsoft Office 2013 for Windows (one-time purchase)
- Microsoft Office for iPad (requires Office 365 subscription)

## 3. Configuration

---

### Installing the XTM Connect Add-in

You first need to install and configure the XTM Connect Add-in. It is available from either the XTM Support Team at: [support@xtm.cloud](mailto:support@xtm.cloud) or from the Office store (available soon on: <https://appssource.microsoft.com/>).

#### Manual installation and configuration

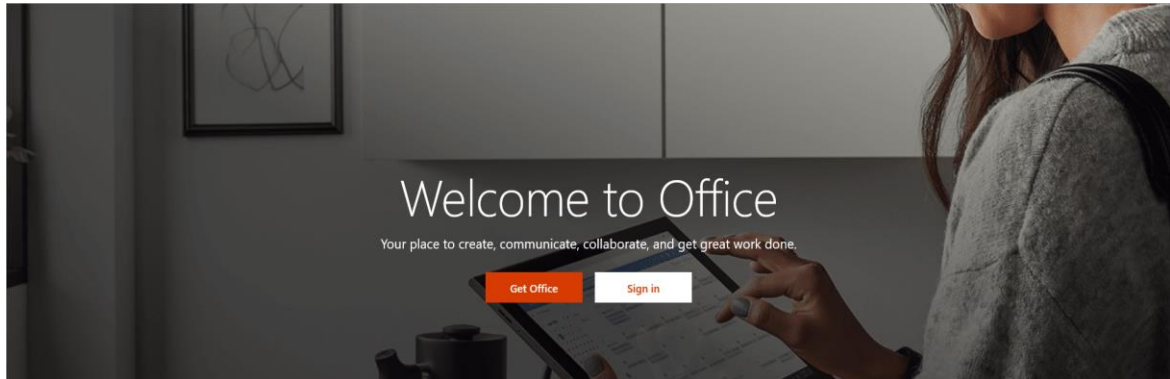
Manual installation and configuration are carried out by your administrator.

For manual installation, you need to send a request to XTM Support Team to get an .xml configuration file. Once you have received the configuration file from XTM Support Team:

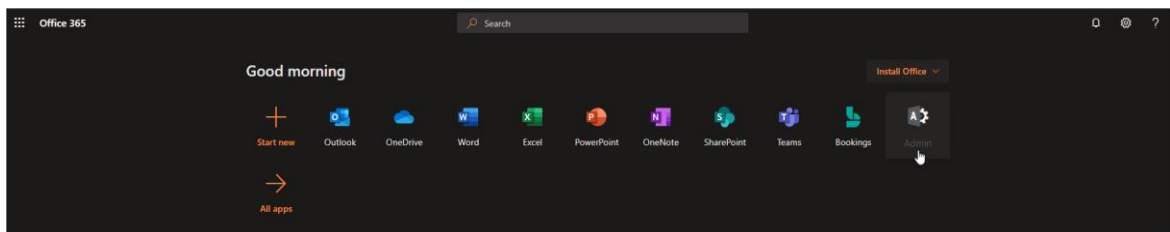
- 1) Sign in to your Excel365 instance.
- 2) Go to the Admin panel to install the connector.

## XTM Connect - Microsoft Excel in Office 365

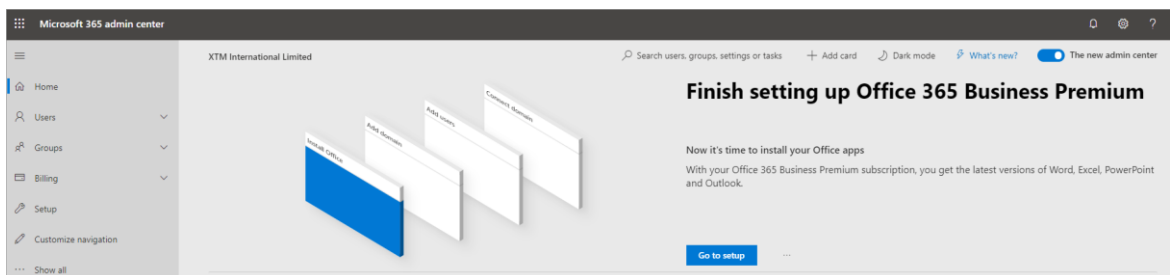
- 3) In the left-hand menu, Click Show all and go to Settings -> Add-ins.
- 4) Click Deploy Add-in -> Next -> Upload custom apps.
- 5) Choose the "I have the manifest file (.xml) on this device" option and click Choose File.
- 6) From the pop-up window, choose the manifest.xml file and click Open.
- 7) Click Upload to upload the file.
- 8) Once the file is visible in the Add-ins, click it to assign users (e.g. Everyone).
- 9) Click Deploy.



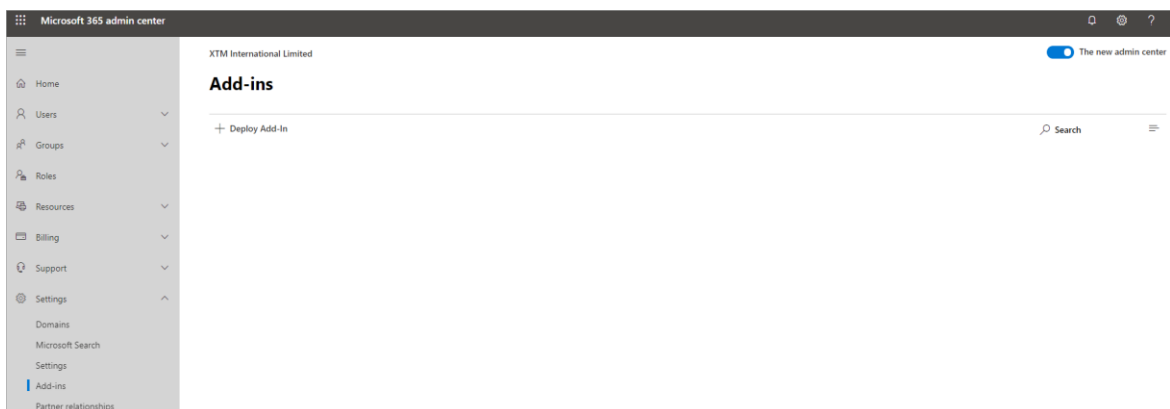
*Signing in to Excel365*



*Excel365 instance*



*Admin panel*



*Show all -> Settings -> Add-ins*

### Deploy a new add-in

The Centralized Deployment service lets you deploy [Office Web add-ins](#) to users of Excel, Outlook, PowerPoint and Word.

Learn more about the requirements for [Centralized Deployment](#).

Add-ins deployed from the Store will automatically receive updates as the providers continuously improve their service. If an add-in update significantly increases the scope of data access, you must re-approve it before the update is deployed.

Next

Cancel

*Deploying a new add-in*

### Deploy a new add-in

**Deploy from the Store**

Get solutions tailored to your industry that work with the products you already use.

Choose from the Store

**Deploy a custom add-in**

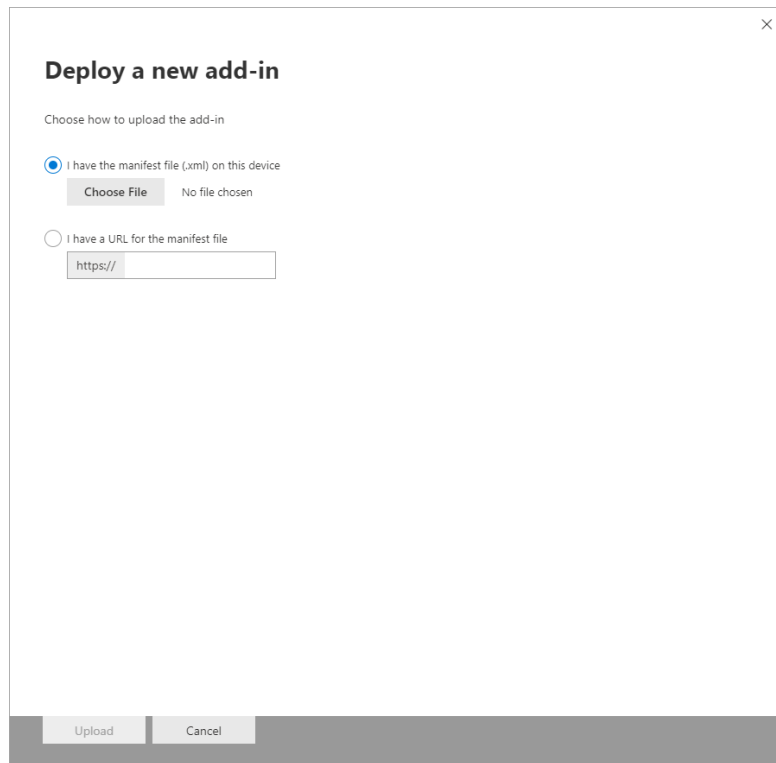
Create a new web application, or upload an add-in / integration for Office.

Upload custom apps

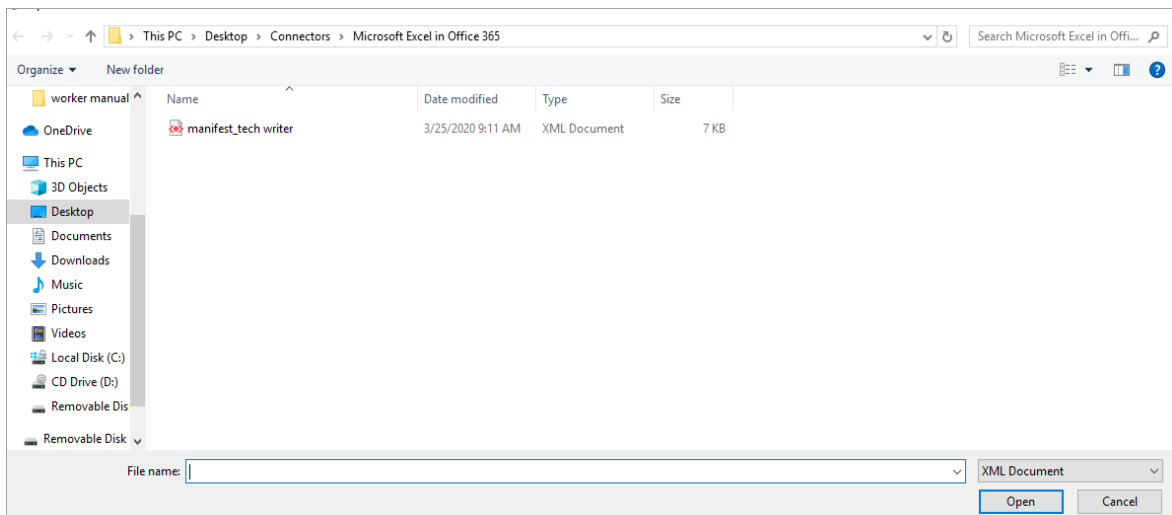
Cancel

*Uploading custom app*

## XTM Connect - Microsoft Excel in Office 365



*Choosing the XTM manifest (.xml) file*



*Opening the XTM manifest (.xml) file*

×

## Deploy a new add-in

Choose how to upload the add-in

☒ I have the manifest file (.xml) on this device

Choose File

manifest\_tech\_writer.xml

☐ I have a URL for the manifest file


https://

Upload

Cancel

*Selected file*

## Configure add-in



**XTM Connect**  
By XTM

**Assign Users**  
Choose which users will have access to XTM Connect

☒ **Everyone**

☐ **Specific users / groups**  
Search for specific users or groups to add or remove  

Start typing a name to search for users

☐ **Just me**

After you choose 'Deploy', the add-in will be available on assigned users' ribbons the next time they open their app.

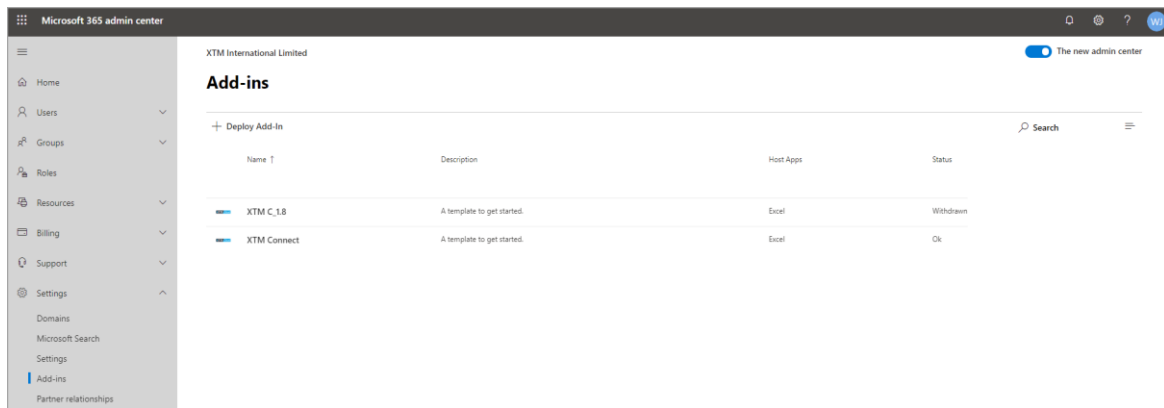
Deploy

Cancel

*Assigning users*



## XTM Connect - Microsoft Excel in Office 365

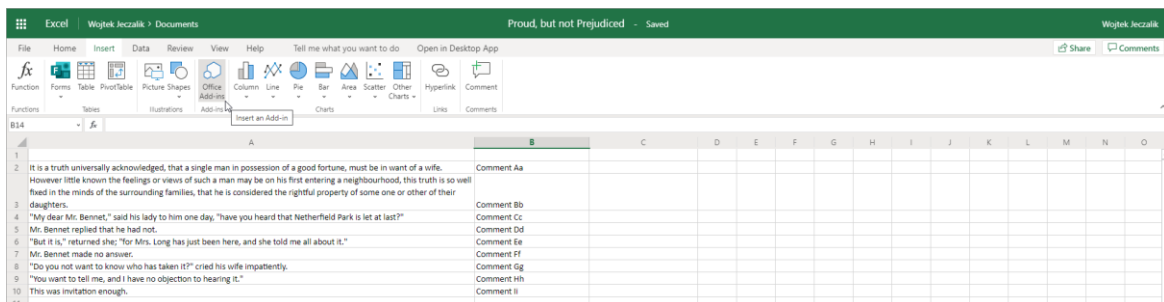


*The add-in installed*

### Getting the XTM Connect Add-in

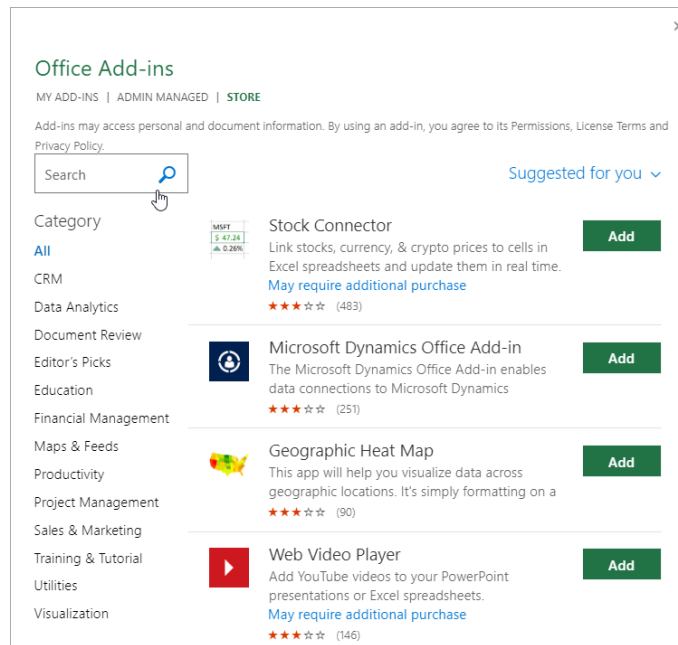
Once the administrator has configured and installed the app, you can add the XTM Connect Add-in to Excel:

- 1) Go to Insert -> Office Add-ins to open a pop-up window.
- 2) Open the Admin Managed tab (or the Store tab).
- 3) Choose the XTM Connect icon and click Add.

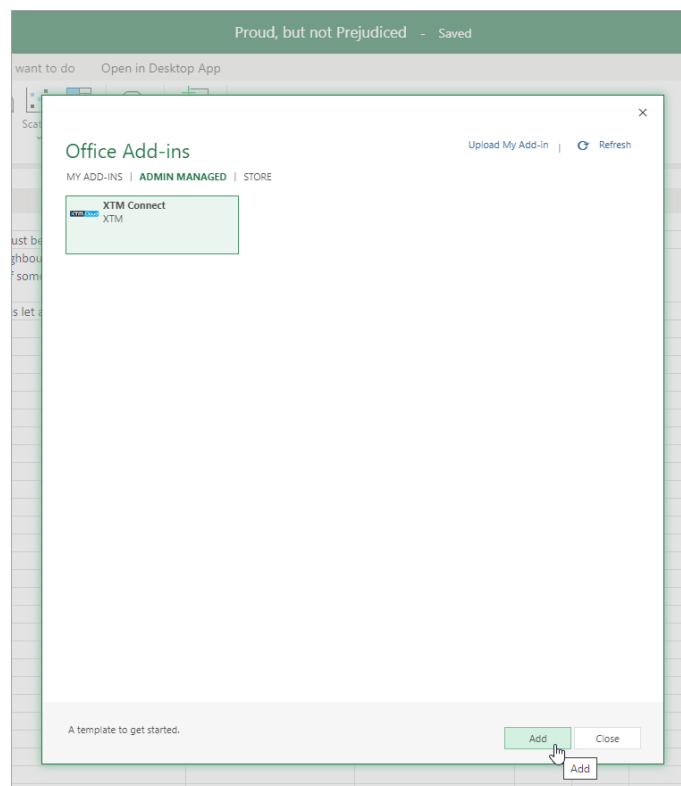


*Office Add-ins button in the navigation bar*

## XTM Connect - Microsoft Excel in Office 365

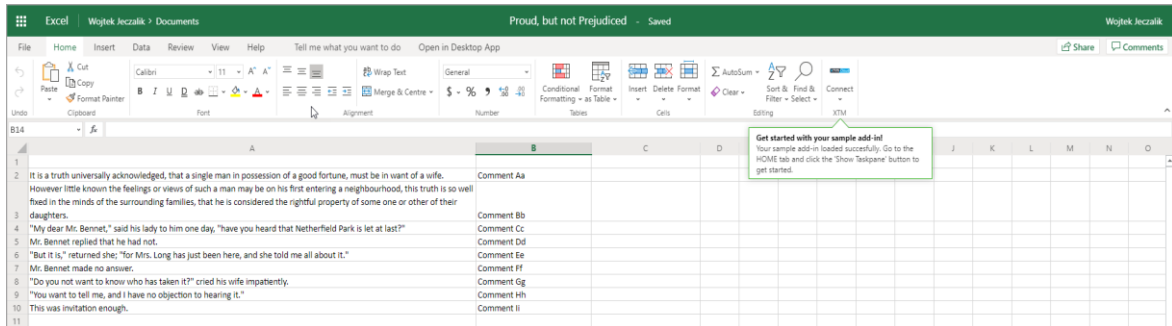


*Office Add-ins – Store tab*



*Office Add-ins – Admin Managed tab*

## XTM Connect - Microsoft Excel in Office 365



*XTM Connect button added to the navigation bar*

### Connecting to XTM

The XTM connection credentials (namely: login, password, company, XTM server URL, customer ID) are stored individually for each Microsoft account. Every new user needs to set up a connection with XTM when they open the Add-in for the first time. This is done only once and does not have to be repeated every time you open the spreadsheet (unless the add-in has been disconnected).

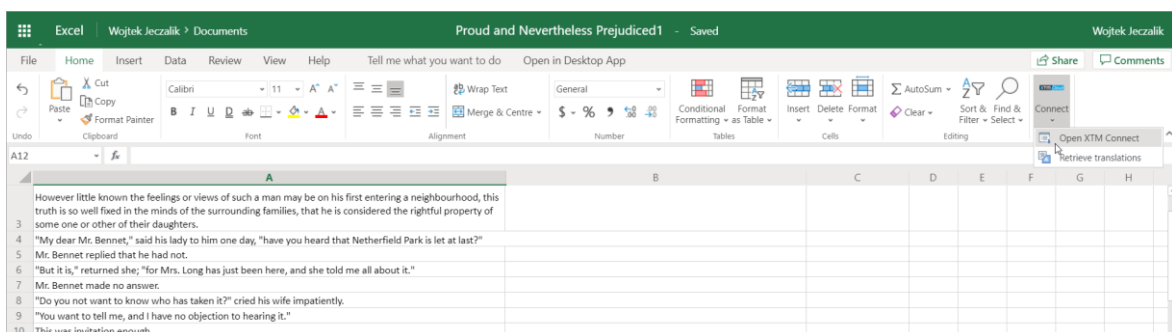
To connect to XTM:

- 1) Click XTM Connect -> Open XTM Connect.
- 2) In the popup window, provide your credentials:
  - Client name: the name of your XTM instance
  - User name: the name of the user (Project Manager) in XTM
  - Password: the password used to log in to XTM
  - XTM server URL: the https of the XTM instance you use

**Note:** With the release of XTM v.12.2, access to Excel365 can be granted to two types of XTM Project Managers: those with full and limited management rights.

- 3) Click Connect to XTM. Once you are connected, choose a Customer (created in XTM) from the dropdown menu.
- 4) Click Confirm.

Once you are connected to XTM, the source language drop-down lists are populated from XTM with all source languages available for the customer you have selected.



*Opening the XTM Connect – Microsoft Excel*

XTM Connect

×

Client:

techwriter

User name:

techwriter

Password:

\*\*\*\*\*

XTM server URL:

https://wstest2.xtm-intl.com

Connect to XTM

*Providing credentials*

XTM Connect

×

Client:

techwriter

User name:

techwriter

Password:

\*\*\*\*\*

XTM server URL:

https://wstest2.xtm-intl.com

Customer:

Tech Writing Ltd

You are successfully connected to XTM. Please choose the customer from the dropdown list

Confirm

*Choosing a customer*

## XTM Connect options

The connector offers you a great deal of options to choose from when you want to request translation.

Get logs	Obtain a file that records events in the XTM connector. This is particularly useful when troubleshooting problems.
Disconnect	Break off the connection between the connector and XTM instance if you want to change the connector settings.
Translate type: Column / Spreadsheet	Choose the scope of content to be sent for translation: <ul style="list-style-type: none"> <li>Column: mark entire columns or a set of consecutive rows in one column</li> <li>Spreadsheet: mark entire spreadsheet</li> </ul>
Source/Target	Choose a translation language pair.
Add comments	Include comments so that they are visible to translators in XTM. You can choose to display them as: <ul style="list-style-type: none"> <li>Comments in the docked panel</li> <li>New column in the workspace window</li> </ul>
Monitor target length	Set limits on the translation length based on the minimum and maximum number of characters specified in a column of the source spreadsheet.
Project template	Use XTM customer templates or XTM global templates. When the user is connected to XTM, the project template drop-down list is populated with all templates available to him.
Save as default	Save the translation project settings for future use and have them applied automatically in a given spreadsheet. This may be useful for often-used project settings.
Restore defaults	Bring back most recent default project settings if they have been modified in any way.
Due date	Set a due date for the entire translation project, using a calendar picker. By default, the "Due date" field is empty and filling it out is optional.
Configuration template	Store the settings provided in the XTM Connect window for a given spreadsheet and create a template that can be imported or exported.
Import/Export	Import/export the Configuration template and share it with other project participants. The exported/imported file is in the JSON format.

XTM Connect

connected to

XTM Cloud

Get logs

Disconnect

Translate type:

Column

Spreadsheet

Source

A

English (UK)

→

Target

D

Croatian

+

Source

A

English (UK)

→

Target

B

Belarussian

+

Add comments

☒

Source

+

Comment

...

Monitor target length

☒

Source

+

Target length

...

Project template

TEST\_TEMPLATE

Save as default

Restore defaults

Due date

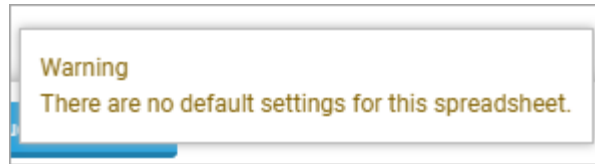
2020-04-24 08:40 pm

Configuration template

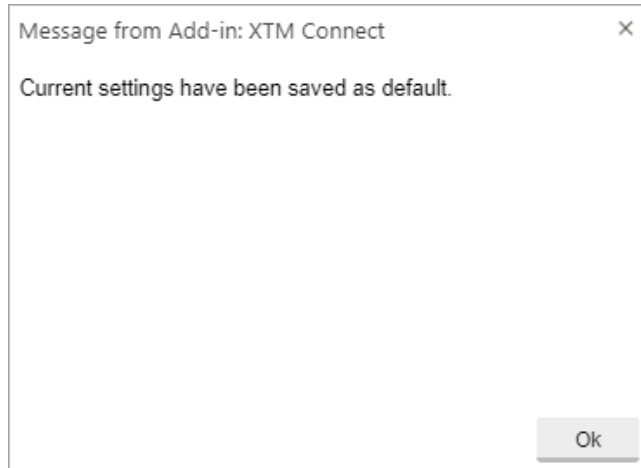
Import

Export

### Translation job essentials



*Pop-up informing that settings were not saved for this spreadsheet*



*Pop-up informing that settings have been saved as default settings*

## 4. Translation workflow

### Translation of columns

When translating columns, it is possible to configure one or more source - target language pairs. Such settings can be saved in the document properties, by clicking the “Save as default” button. Then, they are retrieved automatically when opening the Add-in.

### Sending columns for translation

To send columns for translation:

- 1) In your Excel sheet, highlight the columns you wish to translate.

**Note:** You can select the entire column or a range of consecutive rows in a column, e.g. column A or rows 10-24 in column A.

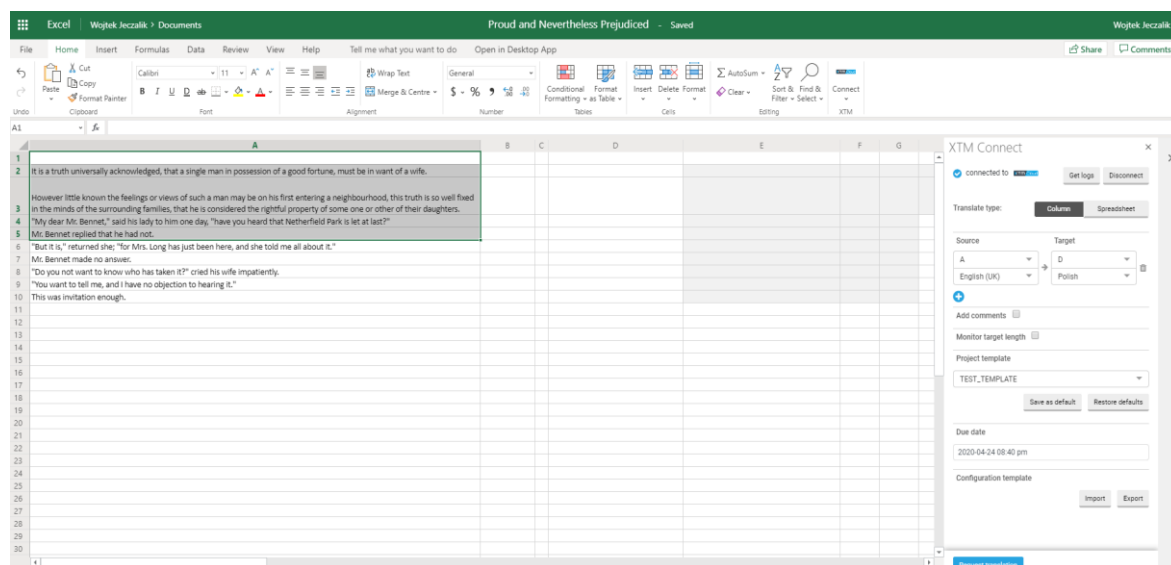
- 2) In the XTM Connect pop-up, choose the source column and source language along with the target column and target language.
- 3) Choose a project template set up in XTM.
- 4) Click Request translation.
- 5) When a project is created, target cells are blocked and they cannot be edited.

If you wish to have a column translated to more than one target language, click the plus icon and repeat the instructions above. The source column will be exported to XTM and have a separate project created for each language pair.

Target columns must be empty to request translation and create a project in XTM. You cannot overwrite the source column with the target text: translations are always retrieved to target columns.

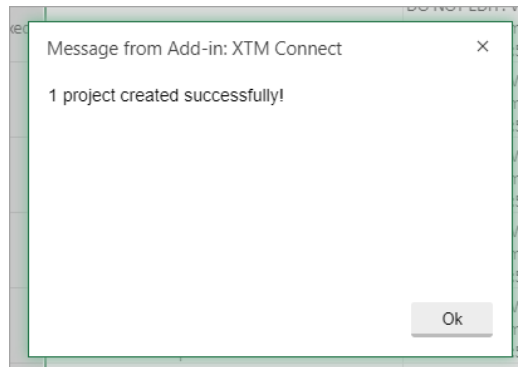
**Note:**

- The project file sent to XTM is converted to an XLIFF file format.
- In XTM, the project name contains Excel sheet name, Excel tab name, and the first few words of the source text. To the projects created with the same name a number is added automatically to distinguish them in XTM.

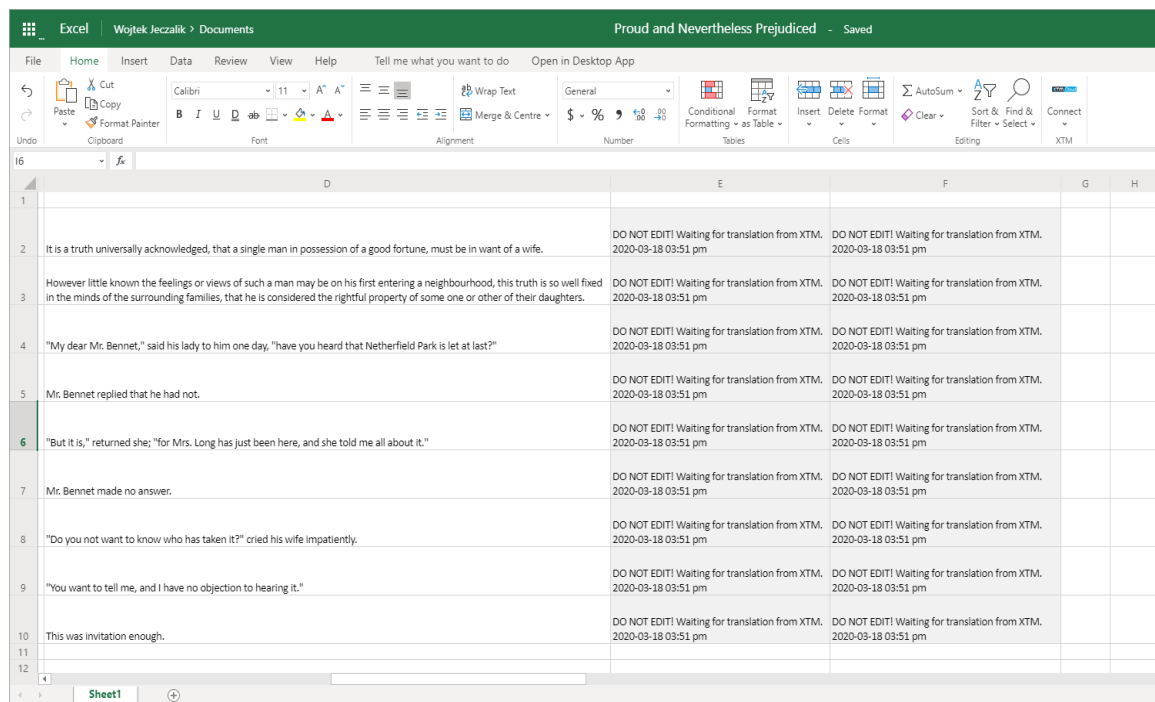




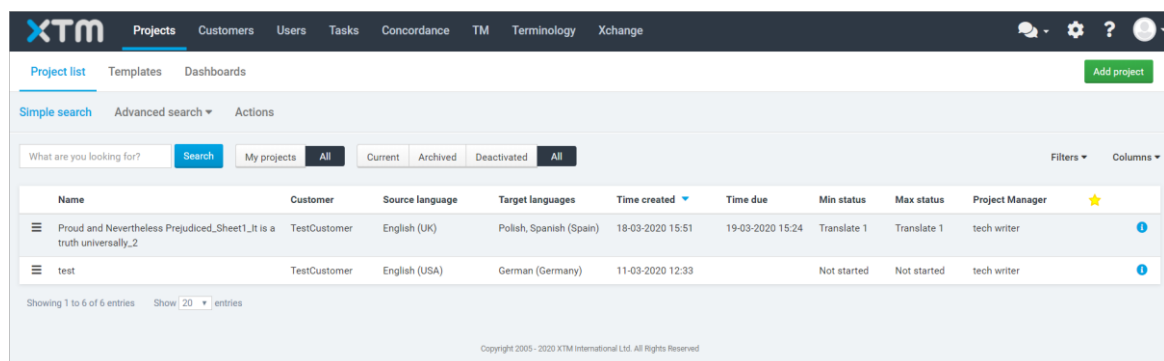
## Creating a project in XTM Connect – Column option



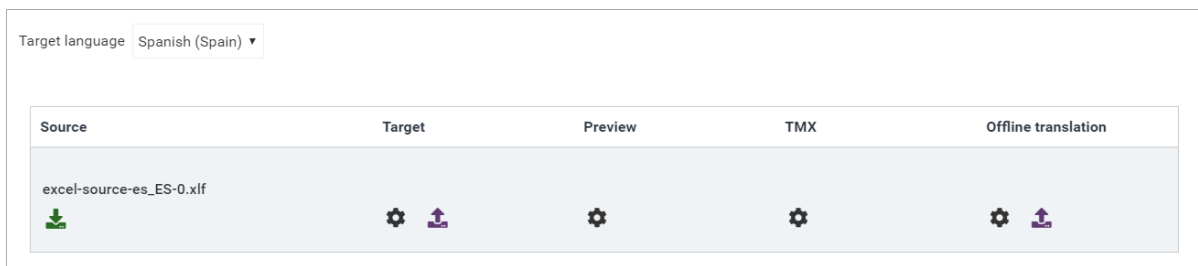
Confirmation message upon project creation



Blocked target cells

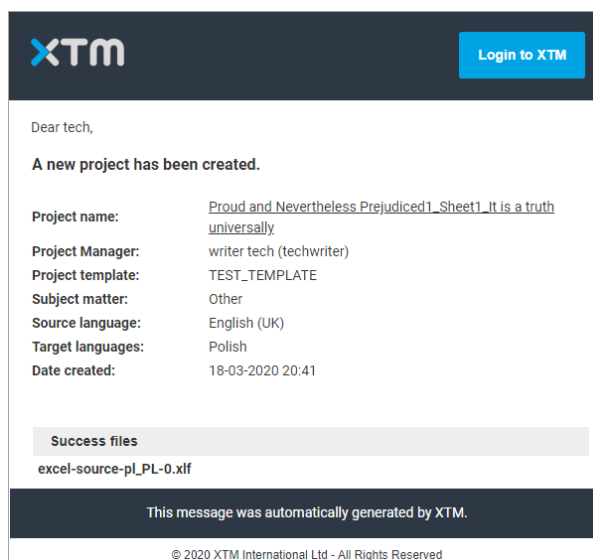


Project view in XTM



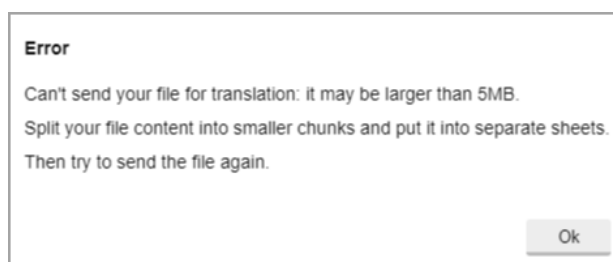
*Source file view in XTM Project editor - xlf*

Project creation is always confirmed with an email sent to the project creator.



*E-mail confirming project creation*

**Note:** The maximum size of Excel files that can be sent to XTM is 5MB, however the number refers to the size with all the metadata added by XTM Connect when creating a project. If the size is exceeded, an error message is displayed. In that case, it is recommended to split the Excel content into smaller pieces, put it into separate Excel sheets, and send it for translation one by one.



*File size restriction - error message*

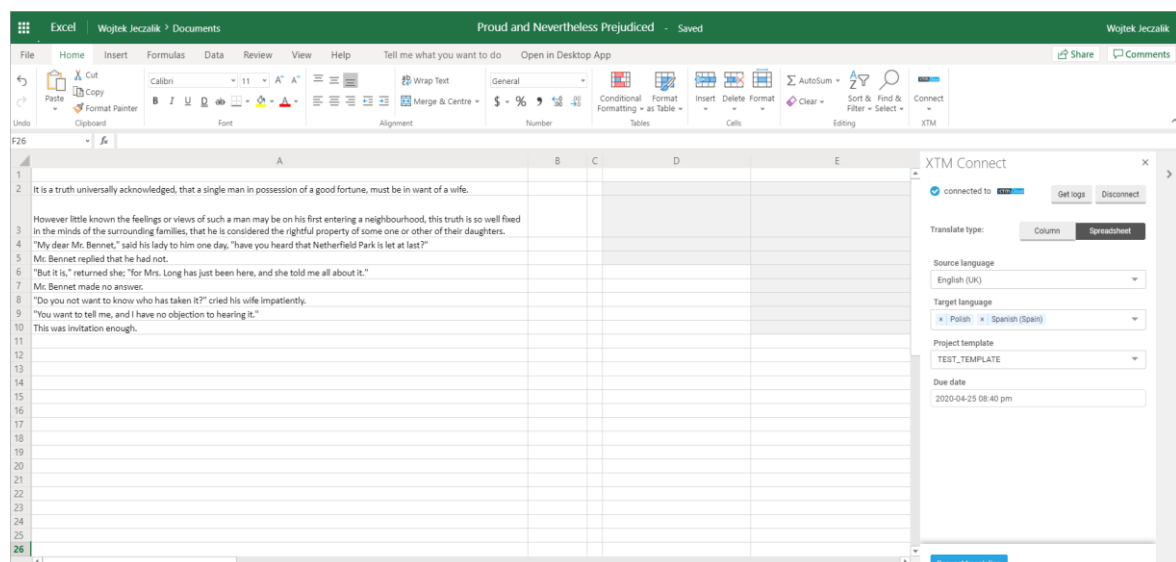
## Translation of whole spreadsheets

You can send an entire spreadsheet for translation and have it translated into one or more target languages. In XTM, separate projects will be created for each target language, while translations will be returned to Excel into separate sheets for each target language.

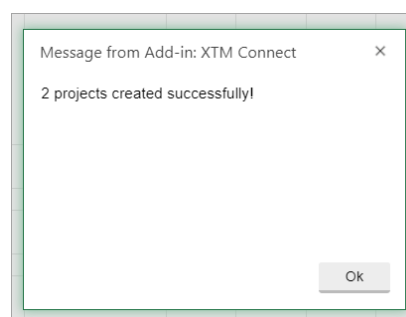
### Sending spreadsheets for translation

To send spreadsheets for translation:

- 1) In the XTM Connect pop-up, click the Spreadsheet button.
- 2) Fill out your project details providing the source language, target language(s), project template and due date (optionally).
- 3) Click Request translation.
- 4) When a project is created, separate sheets are set up and blocked for edition.



*Creating a project in XTM Connect – Spreadsheet option*



*Confirmation message upon project creation*

Name	Customer	Source language	Target languages	Time created	Time due	Min status	Max status	Project Manager
Proud and Nevertheless Prejudiced1_Sheet1_It is a truth universally_9	TestCustomer	English (UK)	Spanish (Spain)	19-03-2020 12:49	27-03-2020 12:48	Translate 1	Translate 1	tech writer
Proud and Nevertheless Prejudiced1_Sheet1_It is a truth universally_8	TestCustomer	English (UK)	Polish	19-03-2020 12:49	27-03-2020 12:48	Translate 1	Translate 1	tech writer

View of projects in XTM

Sheet1 (pl_PL)_1		Sheet1 (es_ES)_2	
1	Jest prawdą powszechnie znaną, że samotnemu a bogatemu mężczyźnie brak do szczęścia tylko żony.	1	Pues así es –insistió ella; la señora Long ha estado aquí
2	Jakkolwiek za pojawieniem się takiego pana w sąsiedztwie niewiele wiadomo o jego poglądach czy uczuciach, owa prawda jest tak oczywista dla okolicznych rodzin, że przybysz zostaje od razu uznany za prawowitą własność tej czy innej ich córki.	2	Es una verdad mundialmente reconocida que un hombre soltero, poseedor de una gran fortuna, necesita una esposa.
3	"Mężu drogi" - zwróciła się pewnego dnia do pana Benneta jego małżonka - słyszałeś, że wydzierżawiono nareszcie Netherfield Park?	3	Sin embargo, poco se sabe de los sentimientos u opiniones de un hombre de tales condiciones cuando entra a formar parte de un vecindario. Esta verdad está tan arraigada en las mentes de algunas de las familias que lo rodean, que algunas le consideran de su legítima propiedad y otras de la de sus hijas.
4	Mąż odparł, że nic mu o tym nie wiadomo.	4	Mi querido señor Bennet –le dijo un día su esposa, ¿sabías que, por fin, se ha alquilado Netherfield Park?
5	"Naprawdę" - zapewniała go żona. - Pani Long wpadła przed chwilą i opowiedziała mi wszystko.	5	El señor Bennet respondió que no.
6	Pani Bennet milczał.	6	Pues así es –insistió ella; la señora Long ha estado aquí hace un momento y me lo ha contado todo.
7	"Czy naprawdę nie jesteś ciekaw, kto go wydzierżawił?" - zawołała wreszcie zniecierpliwiona.	7	El señor Bennet no hizo ademán de contestar.
8	"Ty chcesz mi o tym powiedzieć, a ja nie oponuję."	8	¿No quieres saber quién lo ha alquilado? se impacientó su esposa.
9	Było to wystarczające zaproszenie.	9	Eres tú la que quieres contármelo, y yo no tengo inconveniente en oírlo.
10		10	Esta sugerencia le fue suficiente.
11		11	
12		12	
13		13	
14		14	
15		15	
16		16	
17		17	
18		18	
19		19	
20		20	
21			

View of the two translated sheets

## Handling of metadata

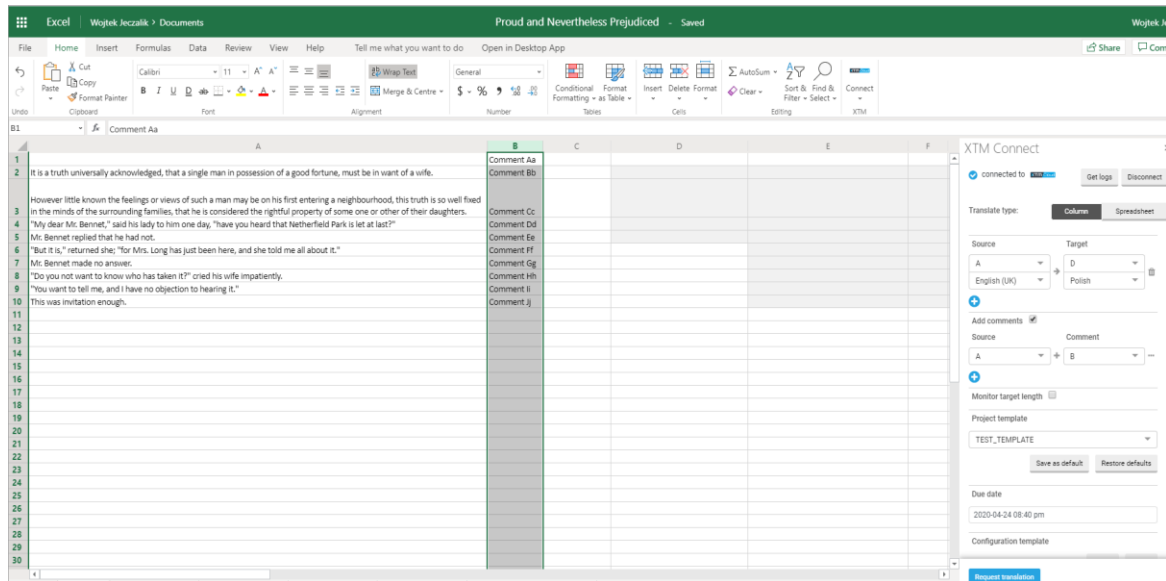
With the XTM Connect Add-in you can choose if you want to display additional data as metadata (in a column in the editor) or as a comment. You can also choose how a comment with metadata is displayed in XTM Workbench: either as a new column or as a comment in the docked panel.

## Sending content with metadata for translation

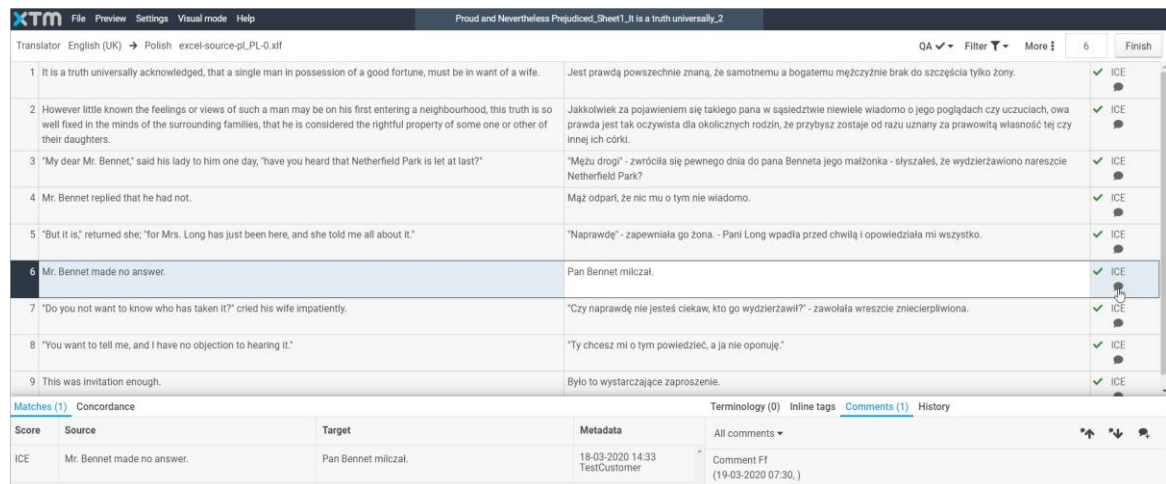
To send content with metadata:

- 1) In your Excel sheet, select the columns you wish to translate along with the metadata columns.
- 2) In the XTM Connect pop-up, choose the source column and source language along with the target column and target language.
- 3) Tick the box by the Add comments option to specify settings.
- 4) In Source – specify the source column, while in Comment – the comment section.

- 5) Click the three dots menu to choose the way the metadata is to be displayed in XTM.
- 6) Choose Project template and (optionally) set the due date.
- 7) Click Request translation.



*Choosing how to display comments in XTM when creating translation requests*



*XTM Workbench – comments in the docked panel Comments section*

XTM					Proud and Nevertheless Prejudiced_Sheet1_It is a truth universally_3	
Translator English (UK) → Spanish (Spain) excel-source-es_ES-0.xlf					QA ✓ Filter ▼ More ⚙	1
No	A	Source	Target	Status		
1	Comment Aa	It is a truth universally acknowledged, that a single man in possession of a good fortune, must be in want of a wife.	Es una verdad mundialmente reconocida que un hombre soltero, poseedor de una gran fortuna, necesita una esposa.	✓		
2	Comment Bb	However little known the feelings or views of such a man may be on his first entering a neighbourhood, this truth is so well fixed in the minds of the surrounding families, that he is considered the rightful property of some one or other of their daughters.	Sin embargo, poco se sabe de los sentimientos u opiniones de un hombre de tales condiciones cuando entra a formar parte de un vecindario. Esta verdad está tan arraigada en las mentes de algunas de las familias que lo rodean, que algunas le consideran de su legítima propiedad y otras de la de sus hijas.	✓		
3	Comment Cc	"My dear Mr. Bennet," said his lady to him one day, "have you heard that Netherfield Park is let at last?"	Mi querido señor Bennet –le dijo un día su esposa, ¿sabías que, por fin, se ha alquilado Netherfield Park?"	✓		
4	Comment Dd	Mr. Bennet replied that he had not.	El señor Bennet respondió que no.	✓		
5	Comment Ee	"But it is," returned she; "for Mrs. Long has just been here, and she told me all about it."	Pues así es – insistió ella; la señora Long ha estado aquí hace un momento y me lo ha contado todo.	✓		
6	Comment Ff	Mr. Bennet made no answer.	El señor Bennet no hizo ademán de contestar.	✓		
7	Comment Gg	"Do you not want to know who has taken it?" cried his wife impatiently.	¿No quieres saber quién lo ha alquilado? se impacientó su esposa.	✓		
8	Comment Hh	"You want to tell me, and I have no objection to hearing it."	Eres tú la que quieres contármelo, y yo no tengo inconveniente en oírlo.	✓		
9	Comment Ii	This was invitation enough.	Esta sugerencia le fue suficiente.	✓		

XTM Workbench – comments in an additional column

## Monitoring of target text length

With the XTM Connect Add-in you can choose to set restrictions on the length of translation based on the minimum and maximum number of characters. The two numbers can be specified in the Excel sheet.

### Sending content with character limits set for the target cell

To send content with pre-set character limits:

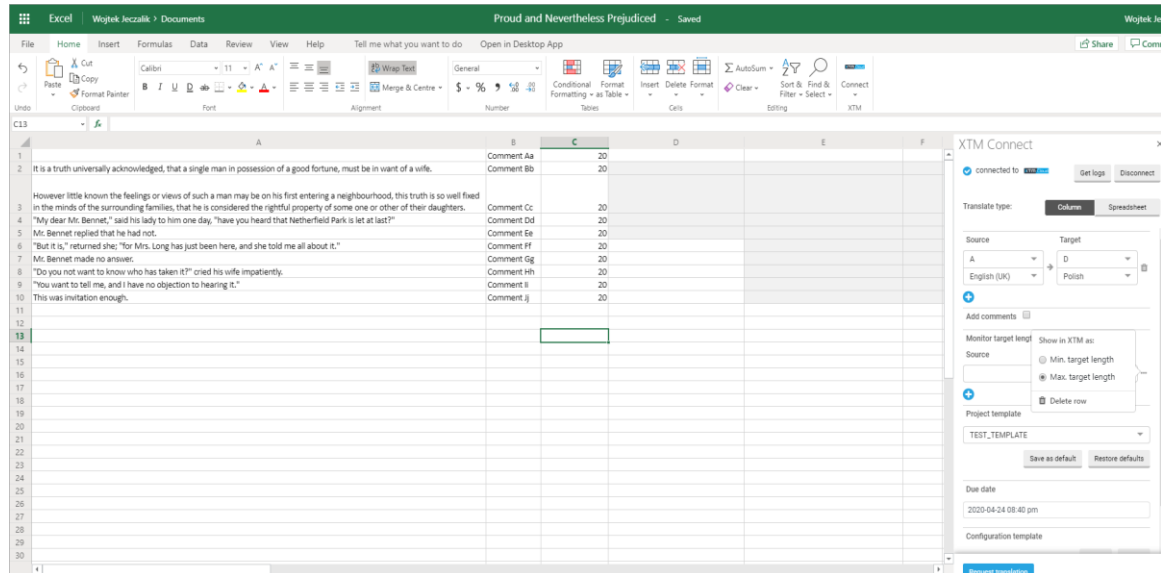
- 1) In your Excel sheet, choose any column to be your target length column and enter the number of characters you want your translation to have. The limit can be set to either a maximum or a minimum number of characters.
- 2) Select the columns you wish to translate.
- 3) In the XTM Connect pop-up, choose the source column and source language along with the target column and target language.
- 4) Tick the box by the Monitor target length option to specify settings.
- 5) In Source – specify the source column, while in Target length – the column with specified target length.

**Note:** the target length column must not be the same as the column you have selected for your translation input.

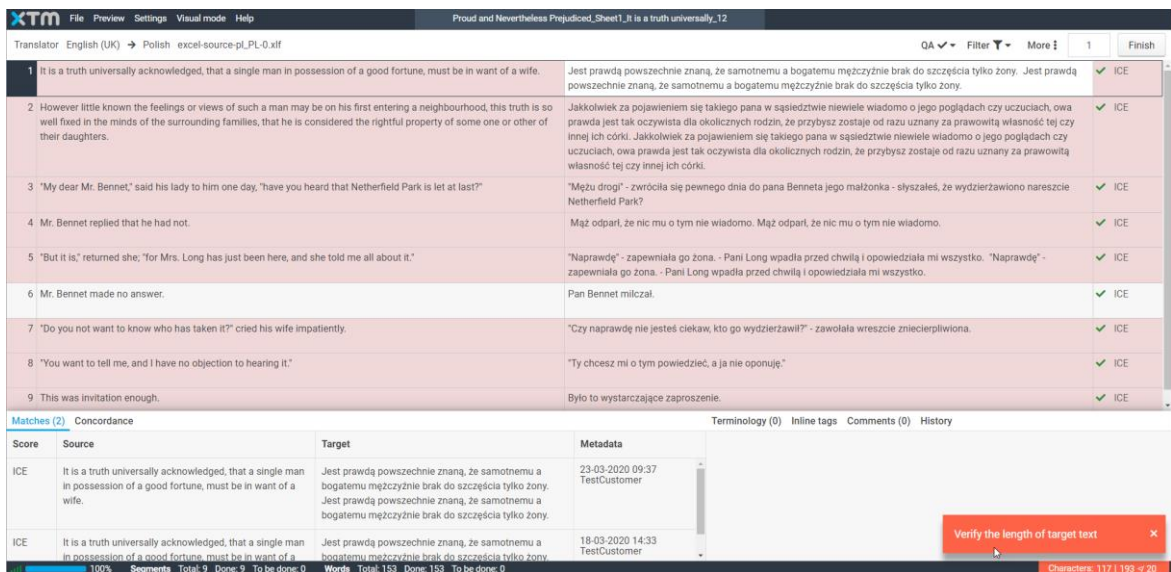
- 6) Click the three dots menu to specify whether the number in the target length column is your minimum or maximum target length limit.
- 7) Choose Project template and (optionally) set the due date.
- 8) Click Request translation.

**Note:** The restrictions regarding the character count are for information purposes only. Exceeding the number or providing translations which do not conform to the rule will not impede retrieval of translated text from XTM when the project is finished.

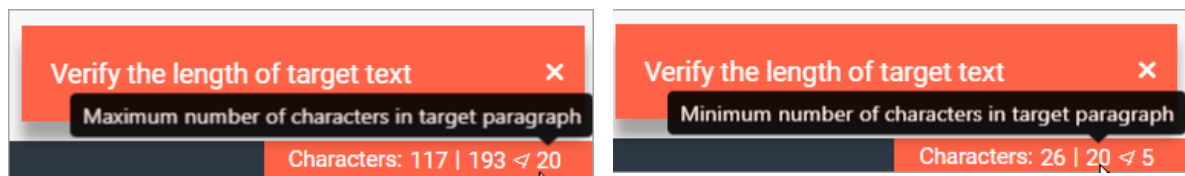
## XTM Connect - Microsoft Excel in Office 365



Setting up a project with Monitor target length option



Project in XTM with monitoring the target text length option



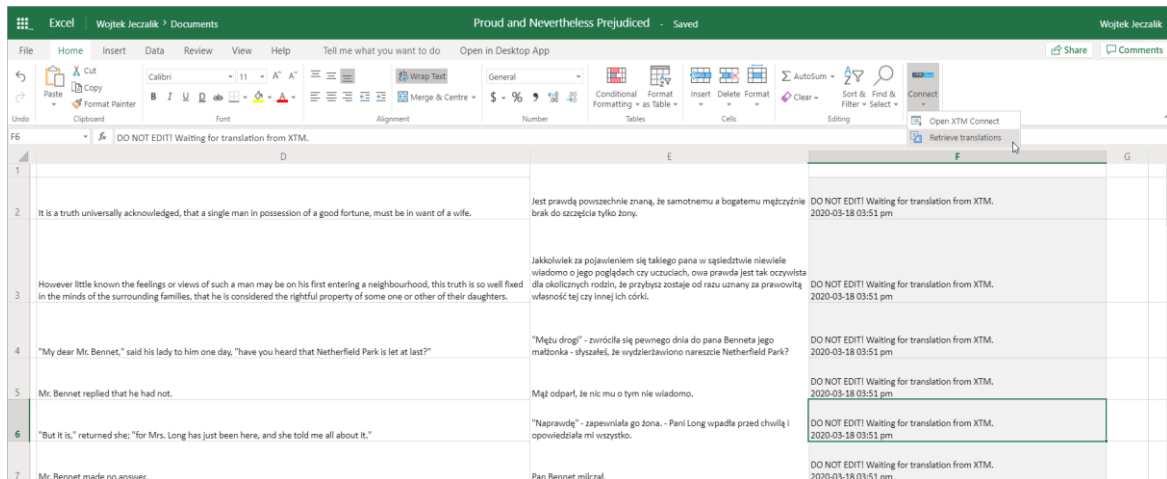
Information about the limits of character count displayed in XTM Workbench

## Retrieving translation from XTM

Translations are retrieved automatically once the translation is finished in XTM. The target cells are auto-populated with translation.

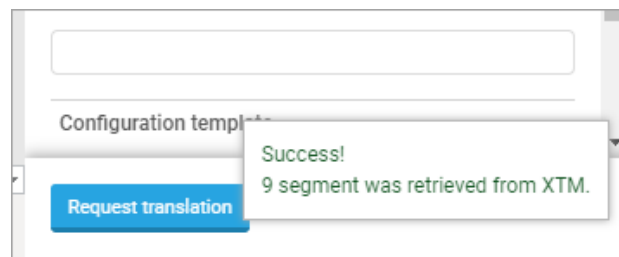
You can also retrieve translation manually from the control panel under XTM Connect.

## XTM Connect - Microsoft Excel in Office 365



*Retrieving translation manually from XTM*

When translations are automatically retrieved from XTM, the following message appears:



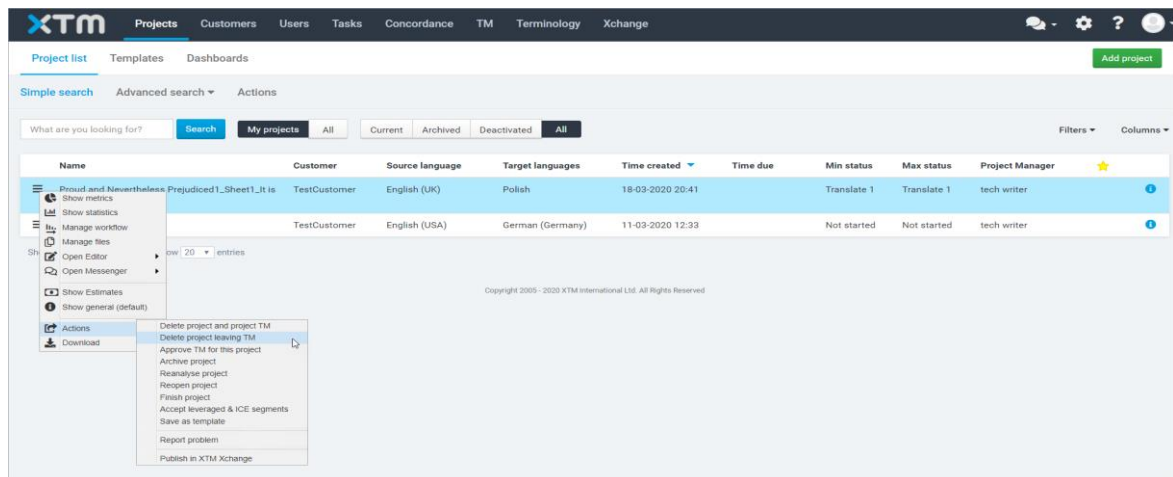
*Retrieving translation – confirmation message*



## 5. Translation workflow in XTM

### Cancelling projects in XTM

The translation is returned when the project is finished in XTM ("Finished" status). However, if a project is deleted or archived in XTM, there is no notification displayed in Excel. In the case of accidental cancellation in XTM, the project will have to be sent again from the Excel spreadsheet.



*Deleting the Excel project from XTM*

## 6. Desktop application

The Excel online is a slimmed-down version of the desktop Excel workbook. It works and looks nearly the same, but it's cloud-based and its usage relies on Internet connection. It is possible to use the XTM Connect Add-in both in the desktop and web versions of Excel. Files can be accessed from your desktop and from cloud.

The Excel desktop app requires purchasing an Office 365 subscription, setting up an account on Office page, and having Microsoft Excel with the Microsoft Office bundle installed on your PC (see supported versions [here](#)). Once you are all set, you can install the XTM Connect Add-in on your desktop application.

If you have Excel installed on your PC and XTM Connect Add-in configured on your Microsoft account, the Add-in should be available from any desktop Excel file.

If not:

- 1) Open an Excel file.
- 2) Go to Insert -> Get Add-ins.
- 3) In the pop-up window choose Admin Managed or Store, depending on your Microsoft account configuration.
- 4) Click XTM Connect and Add.
- 5) The Add-in appears in the upper-right corner of your file.