



Better Translation Technology

XTM Connect for Sitecore

XTM Connect for Sitecore

Documentation for XTM Connect for Sitecore.

Published by XTM International Ltd.

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XTM-International Ltd, PO Box 2167, Gerrards Cross, SL9 8XF, UK
Tel.: +44 (0)1753 480479 email: sales@xtm.cloud <https://www.xtm.cloud>

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1. Introduction

XTM Connect for Sitecore is an auxiliary application for both XTM Cloud and XTM Suite. It connects directly to Sitecore to automate the process of sending Sitecore CMS content to XTM and creating translation projects. Then, once the project workflow is complete, it uploads the translated files back to Sitecore where they can follow their standard approval process. The advantages of XTM Connect for Sitecore are that it reduces the number of manual tasks and thereby decreases costs, turnaround times, and human errors. Also, the connector allows for full in-context quality control before the final delivery. Websites can be translated and reviewed in XTM's Visual Editor without any prior configuration.

XTM Connect for Sitecore is installed on the Sitecore server using the Sitecore user interface.

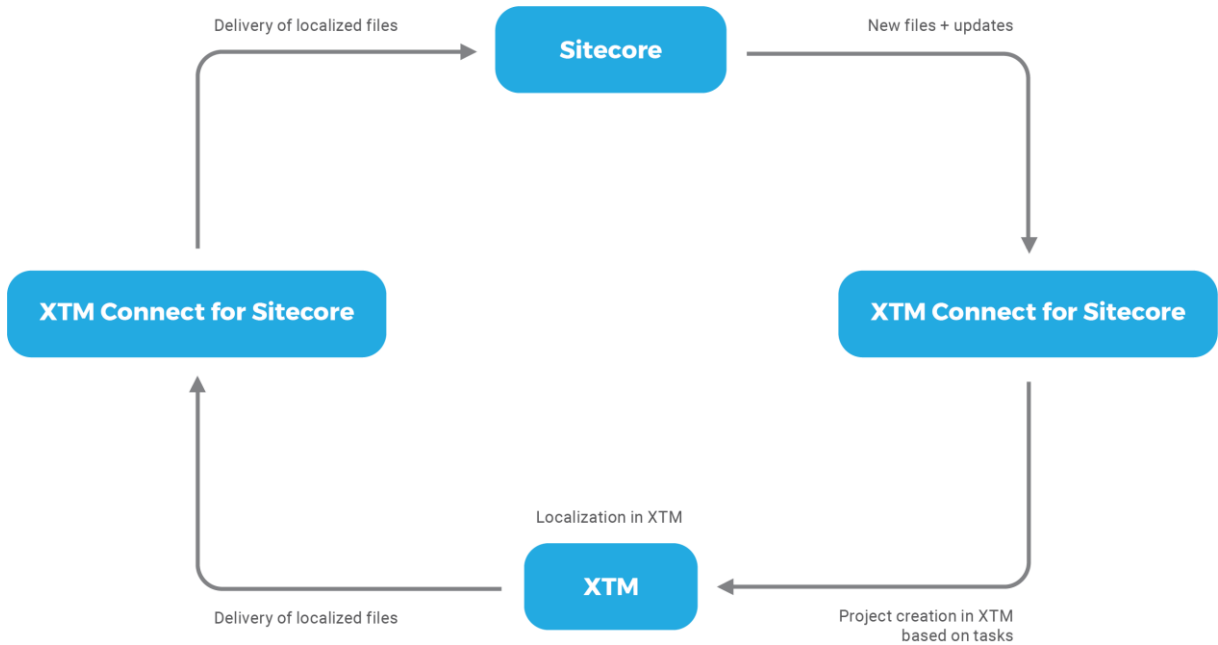
Use of the application is provided under a separate software license and is not included in the standard XTM license or subscription agreement. The installation is very simple and can be conducted by customers.

Contact the XTM Sales at sales@xtm-intl.com to learn more about XTM Connect for Sitecore and request a quote. When you have purchased XTM Connect for Sitecore, XTM International will enable the API connection for you.

2. Overview of XTM Connect for Sitecore

Once XTM Connect for Sitecore is configured to connect with XTM and Sitecore, it acts as an intermediary application that creates projects in XTM. The content for translation is selected manually using the Sitecore user interface. A project is created in XTM Cloud or XTM Suite using one of the predefined templates.

When the translation is finished, XTM sends the target files back to XTM Connect for Sitecore where they can be automatically published or further processed.



XTM Connect for Sitecore workflow diagram

3. Installing XTM Connect for Sitecore

Installation package

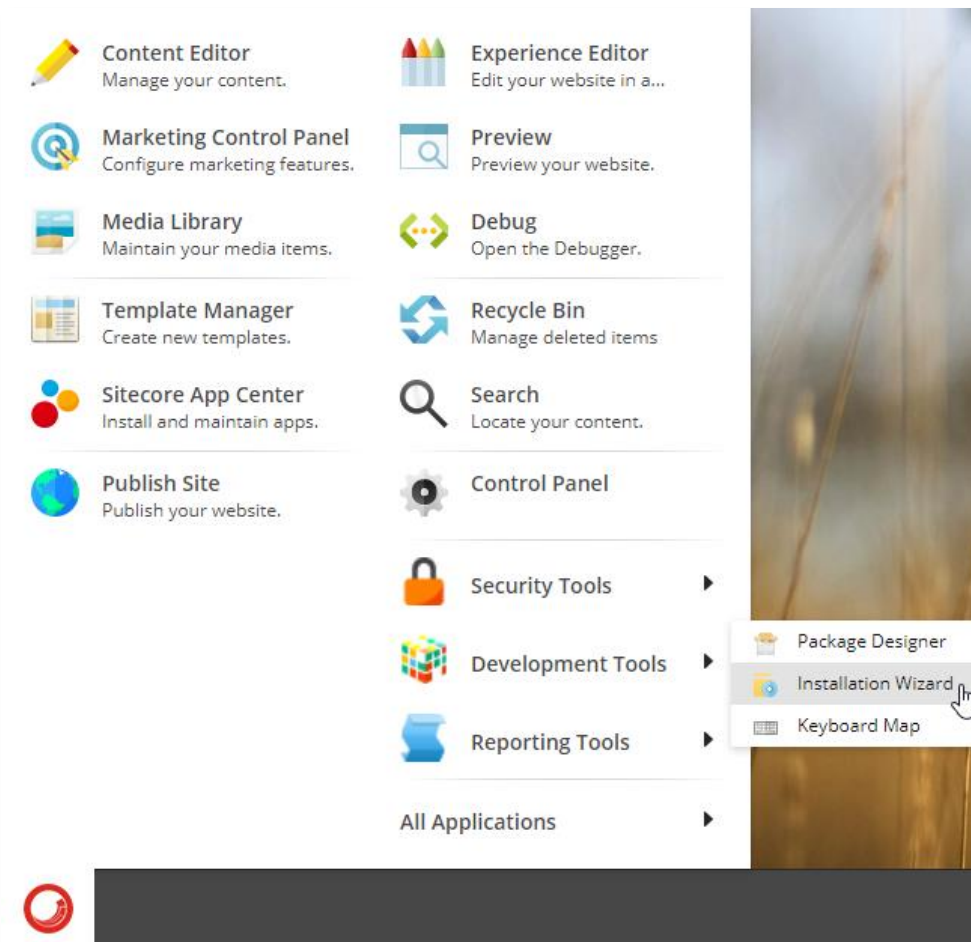
The installation package consists of two archives:

1. XTM Connect for Sitecore - Core vx.x.x
2. XTM Connect for Sitecore - Settings vx.x.x

The vx.x.x represent the version of the files. The installation procedure is the same for both of the files, however, the archives have to be installed in the correct order. The installation should begin with the Core file.

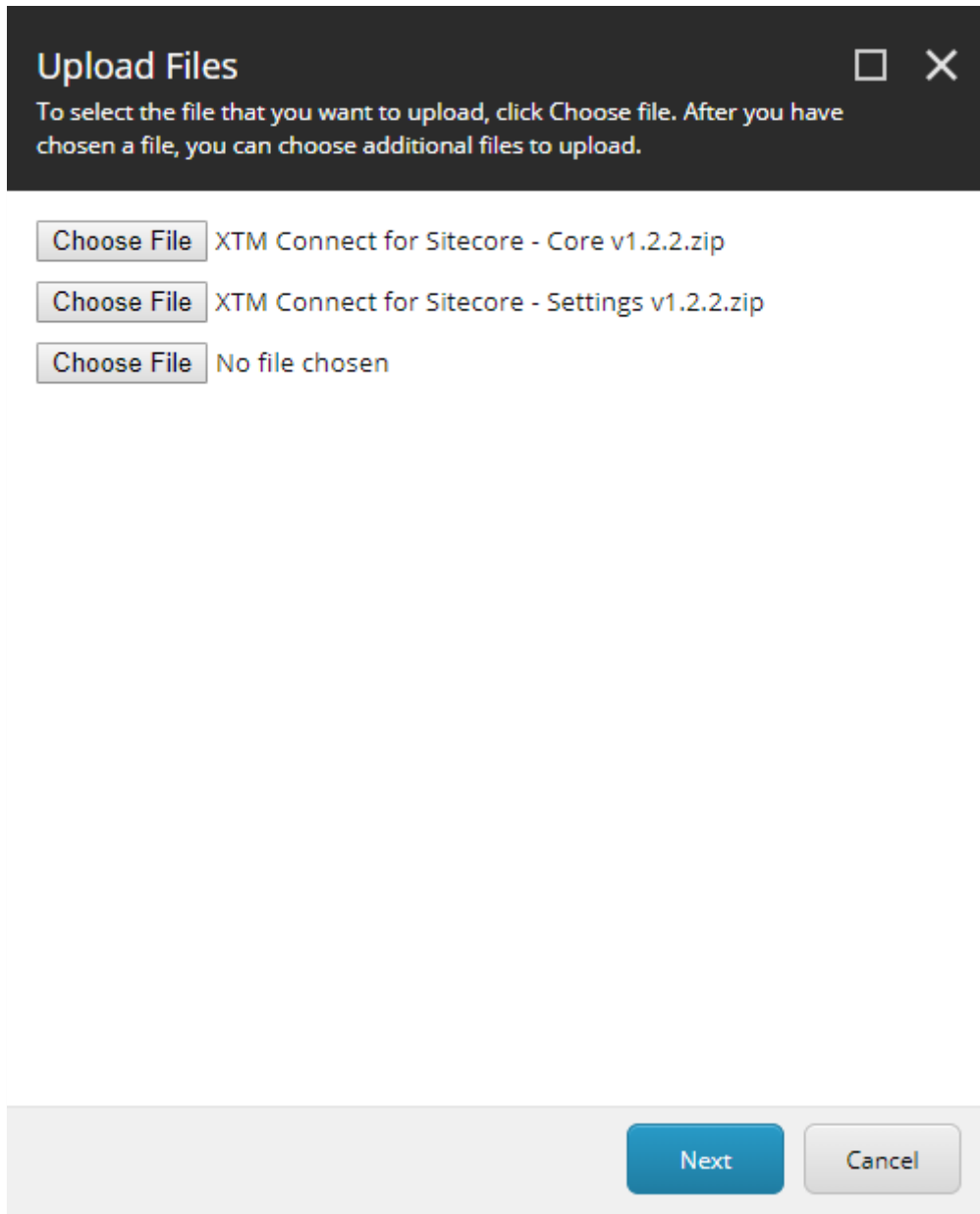
Installation

To install the connector, log in to Sitecore. Go to Desktop, open the menu in the bottom left corner, choose Developing tools, then Installation Wizard.



Opening Sitecore Installation Wizard

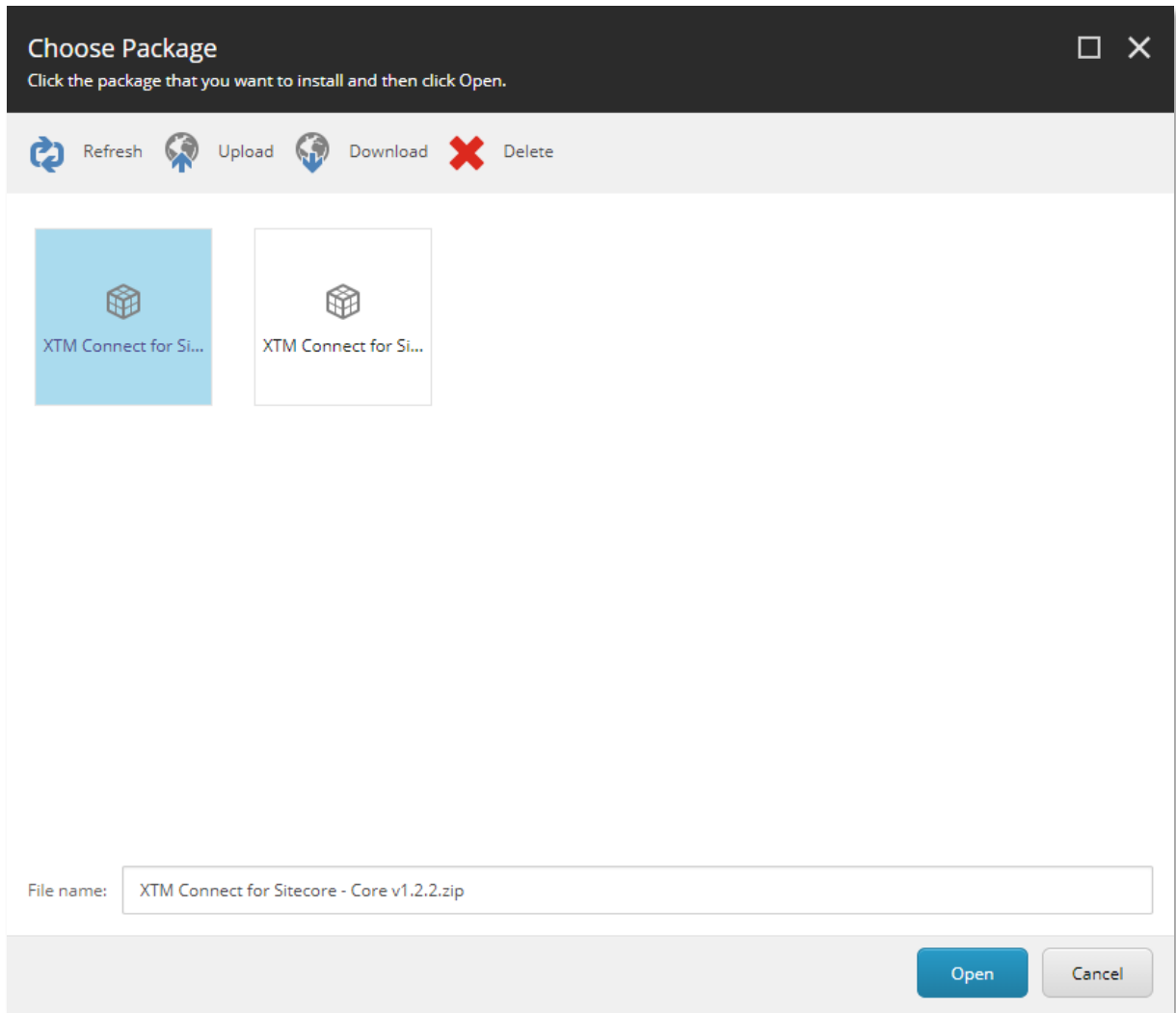
Upload the installation packages and decide whether files should be overwritten when files with the same name already exist. Overwriting files of an existing XTM Connect for Sitecore application can remove currently active translation jobs and settings.



Uploading files to Sitecore for installation

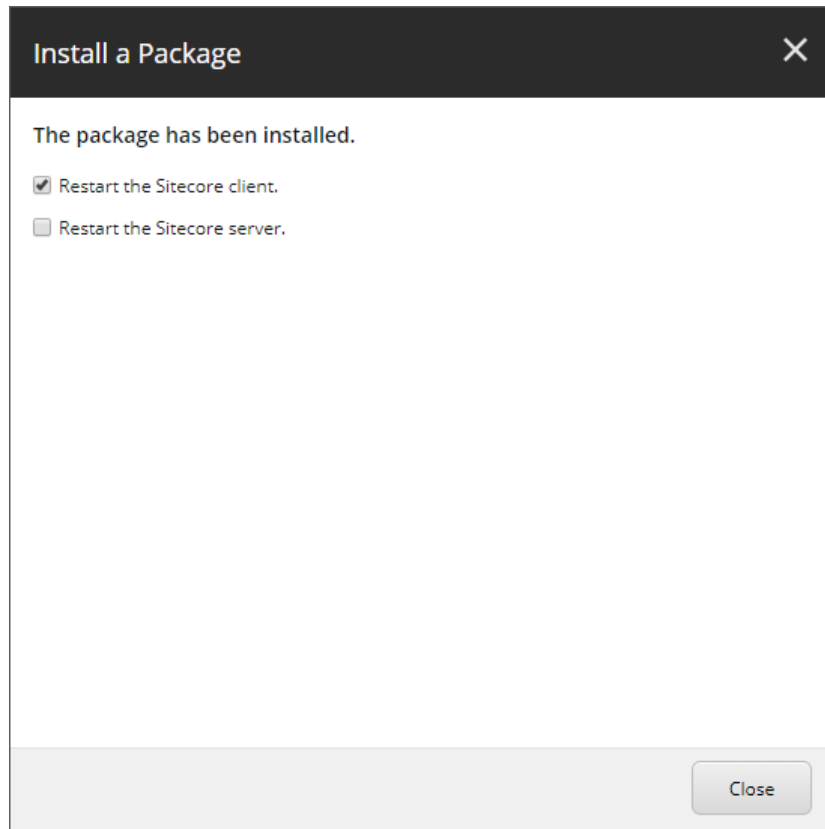
When the files are uploaded, choose the package for installation. Begin with XTM Connect for Sitecore - Core vx.x.x. Open the package and proceed with the installation. If you have installed the connector before, you will be prompted to keep the existing files or overwrite them.

XTM Connect for Sitecore



Choosing the package for installation

When the first package is installed, you can install the XTM Connect for Sitecore - Settings vx.x.x file and restart the Sitecore client.



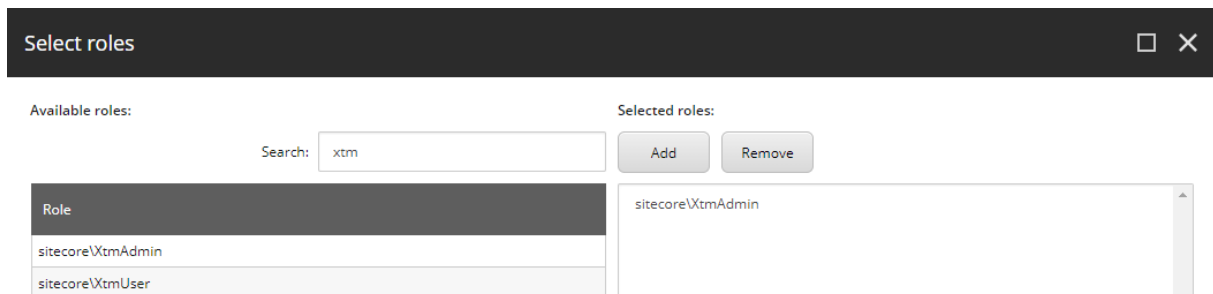
Package installed successfully

Upgrade to a newer version

The upgrade procedure is the same as for installation. During the upgrade, old files are replaced with their newer versions. As a result, any settings or job files in progress will be lost. For this reason, it is important to create a backup copy of the XTM settings file.

XTM user roles in Sitecore

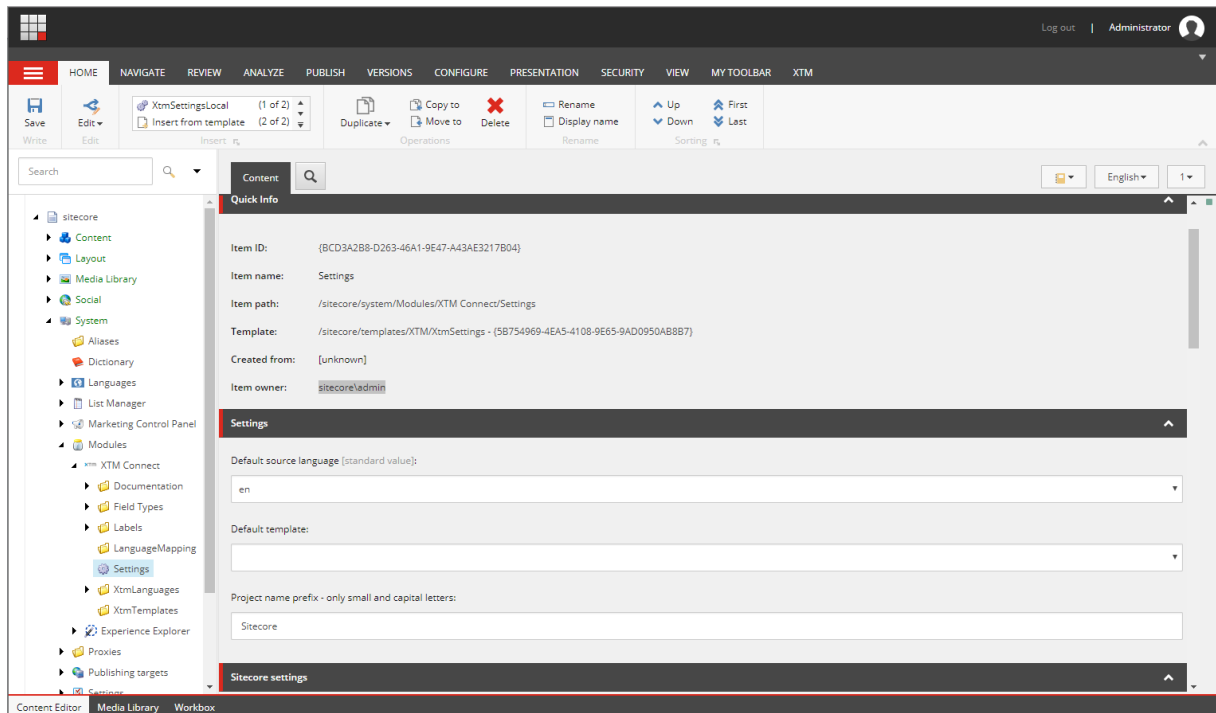
When XTM Connect for Sitecore is installed, two new user roles are added to your CMS: XtmUser and XtmAdmin. The connector configuration privileges are only reserved for the XtmAdmin role. The XtmUser role provides access to the XTM ribbon. It is required to assign this role to a user, otherwise only the administrator will be allowed to request translations.



XTM user roles in Sitecore

4. Setting up XTM Connect for Sitecore

Go to Content Editor. Expand System in the content tree, then Modules, and XTM Connect. Click Settings. XTM Connect settings are divided into several options: Settings, Sitecore settings, Login details, Webservice details, Developer tools.



XTM settings in Content Editor > System > Modules > XTM Connect

Settings

Default source language: the default content source language selected from the dropdown list.

Default template: the default XTM project template. Click XTM in the main ribbon, then Get XTM templates to populate the dropdown list with relevant templates.

Project name prefix: a combination of small and capital letters that you can specify to distinguish Sitecore projects from other projects in XTM. This field is optional.

Sitecore settings

Base Sitecore URL: the URL address of your Sitecore instance required to run interactive previews in XTM Visual Editor, for example <https://mysite.com>. Only HTTPS URLs are supported. XTM Visual Editor will not be available for WYSIWYG interactive previews when the file join feature is enabled during the project creation.

Fields to exclude: specific template fields that you do not want to translate.

Field types to exclude: specific types of fields that you do not want to translate.

Workflow step for content returned from translation: a Sitecore workflow step for files translated in XTM. When the field is left empty, content will follow the standard XTM Connect workflow in which the translated files are awaiting approval upon their import back to Sitecore.

Login details

XTM client: the name you enter in the Company field of the XTM login page

XTM user ID: the project creator user ID. XTM recommends to create a new user specifically for

XTM Connect so that it is simple to track XTM Connect activity separately from human actions. The XTM Connect user needs to have a Project Manager role. You can check the user ID in XTM on the User list (see picture XTM User ID below).

XTM password: the password set for the project creator user. It is the normal password used by the user to log in to XTM

Webservice details

XTM API URL: URL of the SOAP service. In case of XTM Cloud, enter the following URL:

<https://xtm-cloud.com/project-managergui/services/v2/projectmanager/XTMWebService?wsdl>

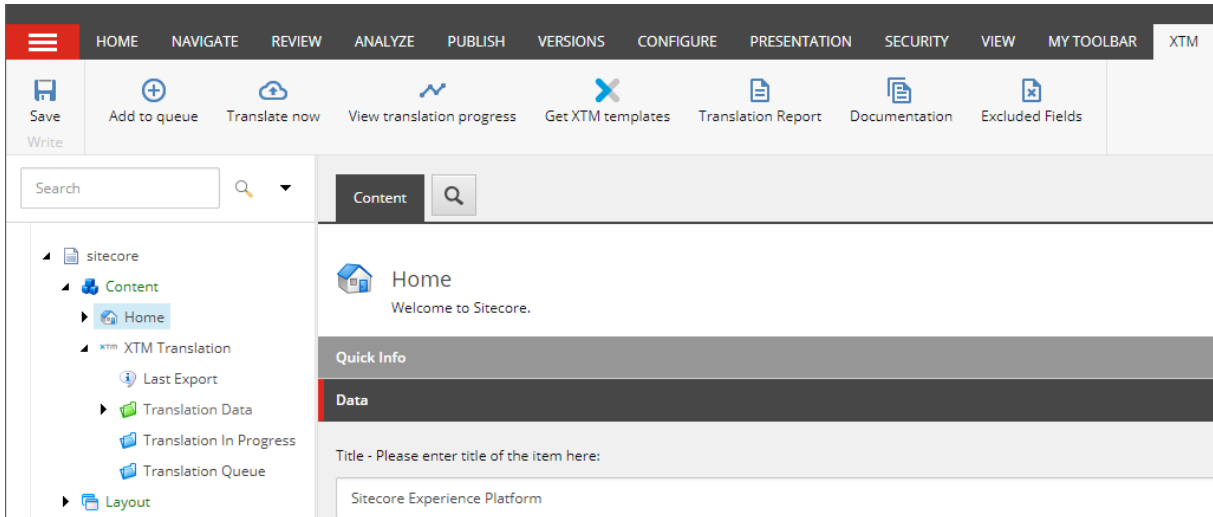
Automatically return translations from XTM to CMS URL: the address of the Sitecore instance where translations should be returned to. When the field is correctly filled in, translations are obtained automatically upon completion in XTM. Completed translations can be found in the Sitecore workbox where they await the next step in the Sitecore workflow.

Developer tools

Enable debugging: leave this option disabled. It is only used for the integration development purposes.

5. XTM Connect user interface in Sitecore

XTM controls are integrated in the Sitecore interface. You can find them in the main ribbon, in the XTM section.




XTM Connect user interface in Sitecore

XTM Ribbon

Add to queue

Opens a popup window where you can specify XTM settings, such as the project name, change the source language when the default one does not apply, select target languages if you want to substitute languages from the template, choose the template, and specify the project due date. Also, Sitecore asks whether to include subitems, and their related content.

Projects added to the translation queue are not sent to XTM. Instead, they are listed in the Translation Queue folder of the content structure tree. When a project exists in the translation queue and has not been sent for translation yet, you can choose to include the newly added items in the project.

Add to Queue


Add "Home" for translation

Project Name (Leave blank if you want to add to existing project):

The default source language is: **English**. Change below if custom source language is required for this content

Choose the target languages (target languages will override any languages specified on an XTM Template)



- Spanish (Spain)
- German (Germany)
- Polish (Poland)
- English
- French (France)

Choose the XTM Template (Do not choose any if not needed)

Add due date to project (leave blank if no due date is necessary)

Include related content:

Include all sub-items:

-  About-us
-  Sample-Content

Also include related content of sub-items:

Add

Adding an item to the translation queue

Translate now

Sends all projects from the translation queue to XTM. A prompt is displayed to confirm the project creation.

View translation progress

Displays the list of projects in translation together with the Sitecore project ID, source and target languages, the date created, and the XTM status. Completed jobs can be imported from XTM using the Import now button that displays only for finished projects, and provided that the configuration field Automatically return translations from XTM to CMS URL is left empty. Projects can only be imported if they have not been automatically obtained first. Automatically obtained projects disappear from the list. Then, files can be found in the Sitecore workbox.



The View translation progress window

Get XTM templates

Obtains XTM templates matching the customer specified in the connection credentials. The button must be clicked to get XTM templates both for the first time after establishing the connection, and after any template updates.

Translation Report

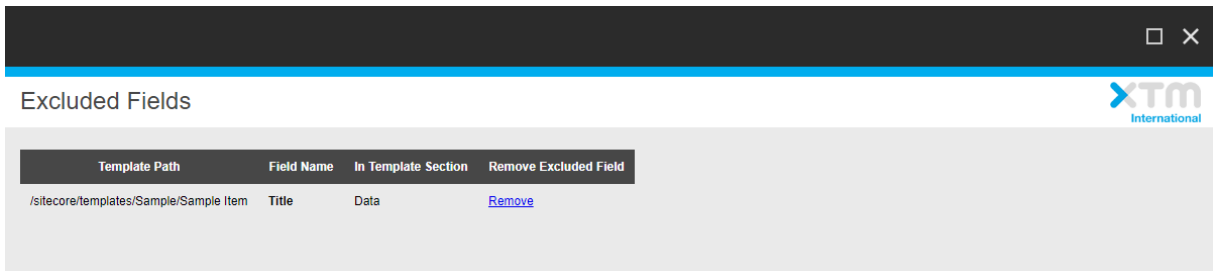
XTM Translation report includes metrics for created projects.

Documentation

XTM Connect for Sitecore documentation is available from the Sitecore interface for quick reference and troubleshooting.

Excluded fields

Opens the popup with the list of excluded fields, and the path of their origins. Items can be removed from the list of fields excluded from translation.



The list of fields excluded from translation

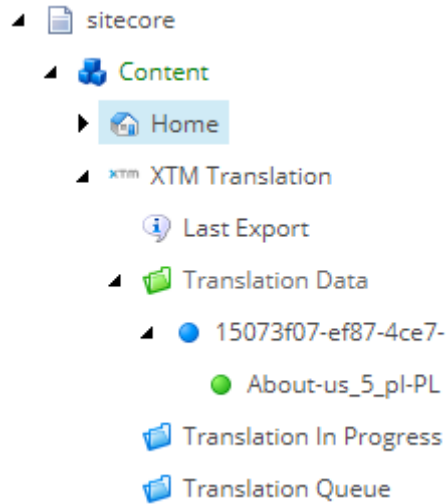
XTM Translation in Sitecore content tree

When you expand XTM Translation in the Sitecore content tree, you will find the date of last export, and three folders: Translation Data, Translation In Progress and Translation Queue.

Translation Data

The Translation Data folder stores information about items that returned from translation in XTM.

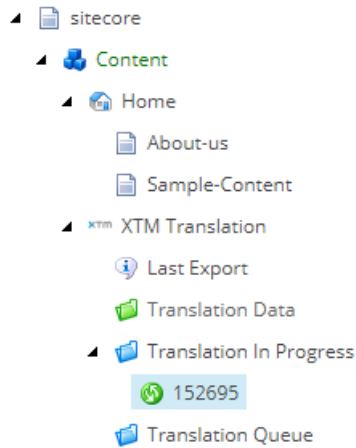
XTM Connect for Sitecore



The Translation Data folder

Translation In Progress

In the Translation in Progress folder the application stores information about projects existing in XTM. However, removing items from the folder will not cancel processing of the project in XTM.

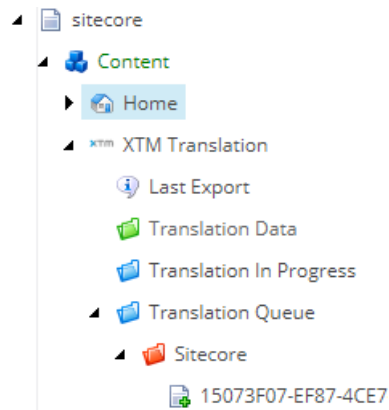


The Translation In Progress folder

Translation Queue

Under Translation Queue you can find the list of items for translation in XTM. Items will be arranged in projects according to the folder name. If you want to remove an item from the translation queue, remove it from the folder.

XTM Connect for Sitecore



The Translation Queue folder

XTM Connector section under content items


Each translatable content item includes an XTM Connector section where data is filled in automatically upon sending the item for translation in XTM. When items are either in translation in XTM or are already XTM translated, by default they cannot be requested for translation again. It is possible to send them for translation again but that requires removing check marks from Translated in XTM or Translation in progress in XTM checkboxes.

A screenshot of the 'XTM Connector' section in Sitecore. The section has a dark header with the title 'XTM Connector' and an upward arrow. Below the header, there are several fields and checkboxes. The first is a checked checkbox labeled 'Translated in XTM'. Below it is a section for 'Project created in XTM:' with 'Now' and 'Clear' buttons, and two dropdown menus showing '5/21/2018' and '4:33 PM'. The next section is 'Sent for translation in XTM by:' with a text input field containing 'Wojtek'. Below that is 'Requested by:' with a text input field containing 'Who knows'. There is a checkbox for 'Translation in progress in XTM [shared]' which is unchecked. The final section is 'Target languages [unversioned]:' with 'Select all' and 'Deselect all' buttons. Below this is a list of target languages, with 'All' selected and 'pl-PL [Not in the selection List]' visible in the 'Selected' column. The list has scroll bars on both sides.

XTM Connector section under a content item

Translating the same content several times will result in more language versions added to the item.

XTM Connect for Sitecore

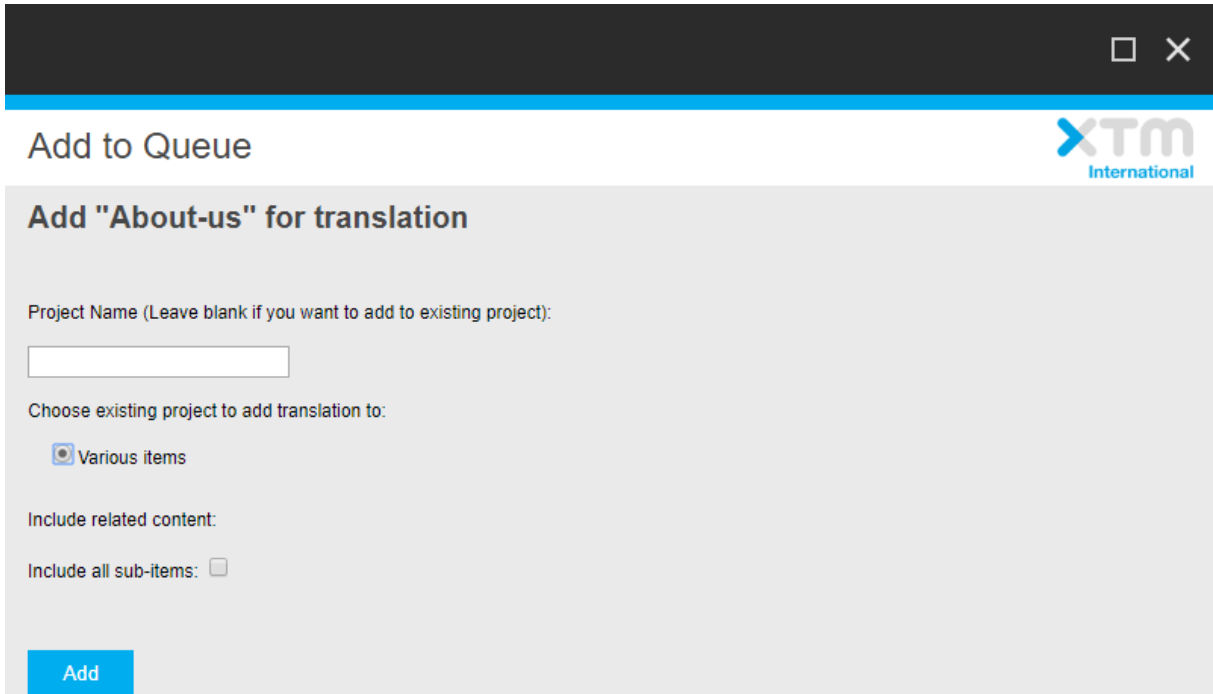
		English	1
Spanish (Spain) : español (España, alfabetización internacional)			
2 versions.			
German (Germany) : Deutsch (Deutschland)			
2 versions.			
Polish (Poland) : polski (Polska)			
5 versions.			
English : English			
1 version.			
French (France) : français (France)			
0 versions.			

Content item versions

6. Localization workflow

Requesting translation

Choose a content item in the Sitecore Content Editor, open XTM section in the main ribbon, and click Add to queue. Refer to [Add to queue](#) to add the item to your translation queue. Select more items for translation, and whether they should be added to the same project or create a new one. Then, click the Translate now button in the XTM section, to send all the content from the queue for translation in XTM.

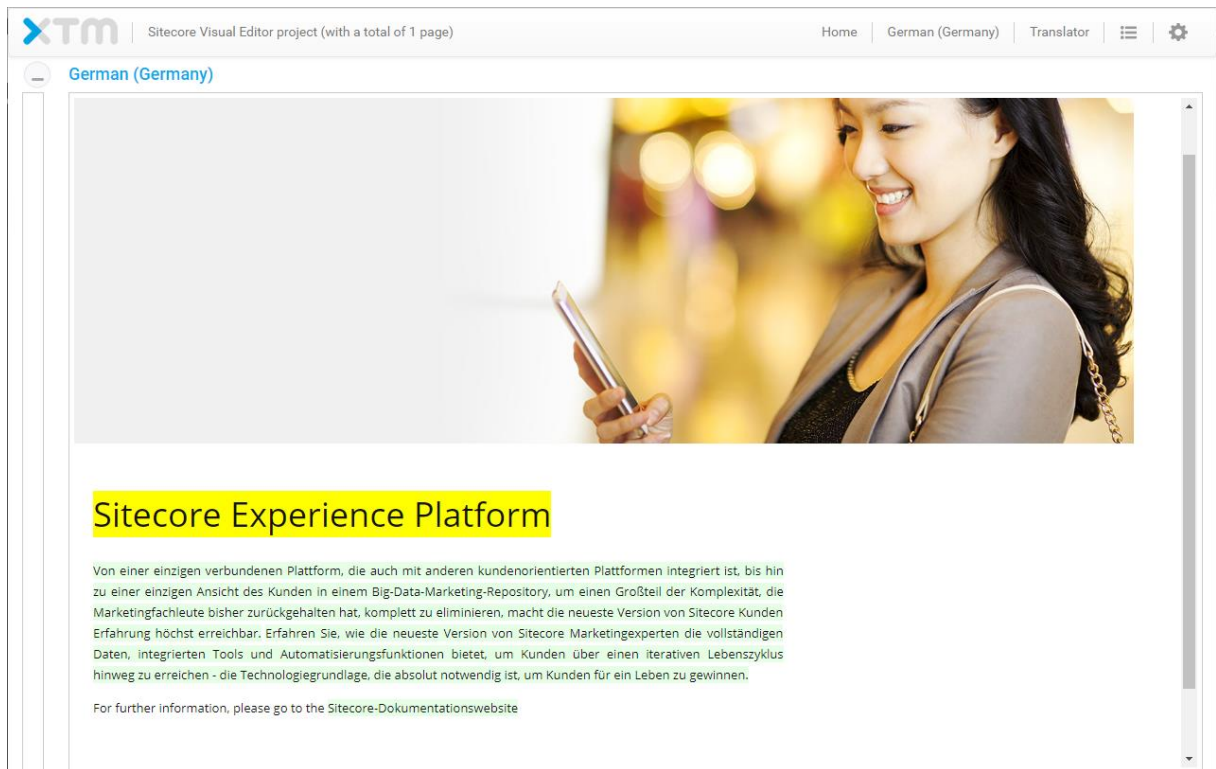


The screenshot shows a dialog box titled "Add to Queue" from XTM International. The main heading is "Add 'About-us' for translation". Below this, there is a text input field for "Project Name (Leave blank if you want to add to existing project):". Underneath, there is a section "Choose existing project to add translation to:" with a radio button selected for "Various items". There is also a section "Include related content:" with a checkbox for "Include all sub-items:" which is currently unchecked. A blue "Add" button is located at the bottom left of the dialog.

Adding more items to a project existing in the translation queue

In-context translation in XTM

When the Base Sitecore URL is correctly specified in the XTM Connect for Sitecore configuration, the file join feature is disabled in XTM, and content item includes visuals, it is possible to translate or review the content in the XTM Visual Editor.



Sitecore content item in the XTM Visual Editor

Return of the translation



When the Sitecore URL is correctly specified in the Automatically return translations from XTM to CMS URL field of your Sitecore configuration, translations are returned to your CMS automatically upon completion in XTM. In such case, they go directly to the next Sitecore workflow step that by default is set to Awaiting approval in the Sitecore workbox.





When the Automatically return translations from XTM to CMS URL option is not used. The project status changes to FINISHED in the pop-up displayed after clicking the View translation progress button in the XTM ribbon. In such case, you have to click Import now next to the project name, to manually import the translation. The content will be go directly to the next Sitecore workflow step like it does in the automated process.

Reviewing translations in Sitecore before publishing

The default Sitecore translation workflow sends XTM translated content items for approval. Items awaiting approval can be found in the Sitecore workbox. They can be previewed, opened, compared between versions, approved or rejected.

XTM Connect for Sitecore

Translated - Awaiting approval - (4 items)  

-  **About-us** - (Polish (Poland), version 5)
Last change: admin changed from ? to Draft (Sample Workflow) on Friday, August 17, 2018.
Comments: Item created [More](#) ▾
[Preview](#) [Open](#) [Diff](#) [Approve](#) [Reject](#)
-  **Home** - (German (Germany), version 5)
Willkommen bei Sitecore
Last change: No changes have been made.
[More](#) ▾
[Preview](#) [Open](#) [Diff](#) [Approve](#) [Reject](#)
-  **Home** - (Polish (Poland), version 5)
Last change: No changes have been made.
[More](#) ▾
[Preview](#) [Open](#) [Diff](#) [Approve](#) [Reject](#)
-  **Home** - (Spanish (Spain), version 2)
Last change: No changes have been made.
[More](#) ▾
[Preview](#) [Open](#) [Diff](#) [Approve](#) [Reject](#)

[Approve \(selected\)](#) [Approve \(all\)](#) [Reject \(selected\)](#) [Reject \(all\)](#)

Content items awaiting approval in the Sitecore workbox



XTM International Ltd, PO Box 2167, Gerrards Cross, SL9 8XF, UK
Tel.: +44 (0)1753 480467 Fax: +44 (0)1753 480465 email: sales@xtm.cloud <https://www.xtm.cloud>