



Clay Tablet Connector for Sitecore

User Guide

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## 1 Welcome to the Clay Tablet Connector for Sitecore

Welcome to the Clay Tablet Connector for Sitecore ("Connector"). The Connector enables you to automate sending and retrieving content from Sitecore, which dramatically reduces the effort required to create, maintain, and publish Web content in multiple languages.

- If you have the Special Edition for Lionbridge Freeway, you can automate sending and retrieving content from Sitecore directly to and from Freeway.
- If you have the Special Edition for Lionbridge onDemand, you can automate sending and retrieving content from Sitecore directly to and from onDemand.

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### 1.1 The Translation Lifecycle

The *translation lifecycle* is the broad process of selecting content, sending it out for translation, and then receiving the translated content back from translation.

This set of steps usually fits inside a larger, more general process called the *content lifecycle*, which is the process of creating, reviewing, editing, approving, and publishing content.

When you consider the translation lifecycle and the content lifecycle together, you have the *global content value chain*, which is the strategy for managing multilingual content.

The content lifecycle and the translation lifecycle are impacted by the workflow steps you implement in Sitecore to manage multilingual content.

Remember that localizing content is a subset of steps in the broader content lifecycle. This will improve your focus on key localization considerations, improve processes, and keep all content stakeholders included. Together, this results in better content management.

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### 1.2 How the Connector Helps You Manage Your Translation Lifecycle

The Clay Tablet Connector for Sitecore ("Connector") is a plug-in module for Sitecore. It provides a range of features and user interface enhancements in Sitecore that enable you to select, send, monitor, and retrieve content for translation into any language Sitecore supports.

These features automate the process, which dramatically reduces the effort and time required to export and re-import content that needs to be localized. This is very helpful when translating large volumes of content or ensuring that translated content is quickly re-imported to meet deadlines.

When you use the Connector, you manage your translation lifecycle entirely from within Sitecore:

1. The Connector exports your content from Sitecore in either XML or HTML format and delivers these content files to the central, hosted Clay Tablet Platform.
2. The Clay Tablet Platform delivers your content to your translation provider, based on routing rules that your company chooses and Clay Tablet Technologies implements.

3. When the translated content is ready, the Clay Tablet Platform retrieves it from your translators and delivers it to the Connector.
4. The Connector automatically re-imports the content into the correct location in Sitecore.

You can then review, revise, reject, or publish the translated content as needed.

**Note:** Neither the Connector nor the Clay Tablet Platform performs any translation. Similarly, Clay Tablet Technologies does not provide any translation services. Your company chooses the translation provider that performs the translation.

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## 1.3 Using this Guide

### Purpose of this guide

This guide describes how to use the Clay Tablet Connector for Sitecore ("Connector") to manage your translation lifecycle. It describes how to send Sitecore items for translation and receive them back from translation.

### Who should use this guide

This guide is intended for content editors, project, marketing, localization or translation managers, or others who are responsible for creating, editing, or approving content for translation that resides in your Sitecore CMS. This guide is also useful for translation providers who receive content from your Sitecore CMS, because it describes your company's translation management process.

### What your company setup should be

This document assumes that:

- Your company already has a functioning instance of Sitecore.
- The Clay Tablet Connector for Sitecore ("Connector") has been implemented, configured, and tested on your Sitecore CMS.
- Clay Tablet Technologies has set up the Clay Tablet Platform to send content to your translation providers.

If Lionbridge is your company's translation provider, it assumes that either Freeway or onDemand is already set up for your company.

### What you should already know

This document assumes that:

- You are familiar with the Connector's configuration for your Sitecore CMS, and the reasons for choosing certain configuration options. This is important because your company's configuration determines which features are available.
- You have a strong working knowledge of the Sitecore Content Editor.

- You are familiar with the basic concepts of the Sitecore Workflow features. This is crucial, because workflow is a core concept required to use the Connector.
- You are familiar with your company's translation process and requirements.
- You have valid user credentials to log into Sitecore.
- You have the required permissions to access the Connector functionality described in this guide.

**Note:** Not all the features described in this guide may be available. Feature availability depends on both your company's Connector setup and the roles to which you are assigned. If you cannot access functionality that you need, contact your company's Sitecore administrator.

## How this guide is organized

This guide contains the following chapters:

Chapter	Description
"Welcome to the Clay Tablet Connector for Sitecore" on page 5	A brief description of the Clay Tablet for Sitecore solution and how it fits into the translation lifecycle. It also includes information about this guide and Clay Tablet Technologies Support contact information.
"Getting Started with the Clay Tablet Connector for Sitecore" on page 11	How to get started and an overview of the Clay Tablet Connector for Sitecore interface and key features.
"Creating Content for Translation" on page 21	How to create, adapt, and filter Sitecore content so that you can send it out for translation using the Clay Tablet Connector for Sitecore.
"Sending Content to Translation" on page 34	How to use the Clay Tablet Connector for Sitecore to send out content for translation.
"Monitoring Translation Status" on page 69	How to monitor the translation status of content that you sent out for translation.
"Reviewing Translated Content" on page 90	How to review and publish translated content after it automatically returns from the translation provider to the Sitecore CMS.
"Post-Translation Features" on page 93	How to perform post-translation tasks, including synchronizing translations, requesting a translation correction, updating a remote TM (translation memory) server, and clearing the translation backup data.

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

For information on installing and configuring the Clay Tablet Connector for Sitecore, read the *Clay Tablet Connector for Sitecore Installation and Configuration Guide*.

## Documentation conventions

This guide uses the following conventions:

Convention	Description
<b>Bold</b>	Highlights screen elements such as buttons, menu items, and fields.
<i>Courier</i>	Highlights input, file names, and paths.
<i>Italics</i>	Highlights terms to emphasize, variables, or document titles.
>	Indicates a menu choice. For example, "Select <b>Sitecore Desktop &gt; All Applications &gt; CTC Translation &gt; Translation Filter.</b> "

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## 1.4 How to Contact Clay Tablet Support

Email @: [support@clay-tablet.com](mailto:support@clay-tablet.com)

Telephone: +1-416-363-0888

You can submit a support ticket either:

- by email
- from the Clay Tablet Zendesk page, using your web browser

### To submit a support ticket:

1. Do one of the following:

- Email [support@clay-tablet.com](mailto:support@clay-tablet.com), and cc (carbon copy) anyone to include in the ticket correspondence.

**Important:** Include the information and attachments in your email that are listed in the sub-sections below.

- Create a ticket in Zendesk:

- a. Open the Clay Tablet Zendesk page in your browser: <https://claytablet.zendesk.com>.
- b. Sign in to Zendesk. If you do not have sign-in credentials, see "[To view and update your support ticket in Zendesk:](#)" below.

**Important:** Include the information and attachments that are listed in the sub-sections below.

- c. Click **Submit a request**.
- d. In the **CCs** field, add anyone to include in the ticket correspondence.

Zendesk automatically creates a ticket and responds to everyone included in the cc field.

2. Everyone in the original cc receives updates unless they request to be removed from the ticket.



**Important:** Check your email spam folder (especially first-time Zendesk users) as sometimes email notifications from Zendesk are marked as spam.

When the issue is resolved, Clay Tablet closes the ticket.

### Information to include in the support ticket:

- client name
- CMS or content system name and version
- Connector or App version installed
- name of job for which the issue occurs
- date of job submission
- detailed description of the issue
- any error text—copy and paste, if applicable

### Files to attach to the support ticket:

- CMS log files for the date the issue occurred
- Clay Tablet log files for the date the issue occurred
- screen capture of the issue

### To view and update your support ticket in Zendesk:

**Important:** You must log into Zendesk to view your support tickets there.

1. Open the Clay Tablet Zendesk page in your browser: <https://claytablet.zendesk.com>.
2. In the top-right corner, click **Sign in**, and enter your credentials.

**Note:** If you do not have sign-in credentials yet, then click either **Sign up** or **Get a password**, and follow the onscreen instructions.

Sign in to Clay Tablet Technologies

Email

Password

Stay signed in

Sign in

Your credentials will be sent over a secure connection

Cancel

[I am an Agent](#)

[Forgot my password](#)

New to Clay Tablet Technologies? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

3. After signing in, click **My activities** to view the tickets you opened or where you are cc'd.
4. To update tickets, you can reply or attach files.

For more information, refer to "Submitting and tracking support requests" in Zendesk's *Help Center guide for end-users*, at: <https://support.zendesk.com/hc/en-us/articles/203664386-Help-Center-guide-for-agents-and-end-users>.

**Important:** Zendesk refers to a *support ticket* as a *support request*. These terms are interchangeable.

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## 2 Getting Started with the Clay Tablet Connector for Sitecore

The Connector supports the Mozilla Firefox and Google Chrome web browsers. The Connector supports Microsoft Internet Explorer 11 with Sitecore 7 and 8.

To access the Connector, log into Sitecore.

**Tip:** To view the Connector user interface in Japanese, change your language setting in Sitecore. For detailed instructions, see [https://doc.sitecore.net/sitecore\\_experience\\_platform/content\\_authoring/the\\_editing\\_tools/change\\_your\\_personal\\_settings](https://doc.sitecore.net/sitecore_experience_platform/content_authoring/the_editing_tools/change_your_personal_settings). Note that your Sitecore administrator must install the Connector language pack to support viewing the Connector user interface in Japanese.

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### 2.1 Key Features

The Clay Tablet Connector for Sitecore (the "Connector") has the following key features:

- "Multiple Ways of Sending Content for Translation" on page 11
- "Optimizing Translation Costs (Use Local TM)" on page 12
- "Selecting a Translation Provider" on page 12

#### 2.1.1 Multiple Ways of Sending Content for Translation

- There are the following multiple ways to send content items out for translation:
  - ▣ Send a single content item for translation from the **Sitecore Content Editor**. For details, see "Submitting a Content Item for Translation using the Content Editor" on page 35.
  - ▣ Send a single content item for translation from the **Sitecore Page Editor** (Sitecore 6 and 7) or the **Sitecore Experience Editor** (Sitecore 8). For details, see "Submitting Content for Translation from the Page Editor or the Experience Editor" on page 41.
  - ▣ Send multiple content items using the **Bulk Translation** wizard. You can filter to exclude content, and send out requests for translations of one target language at a time. For details, see "Sending Multiple Content Items for Translation" on page 46.
- Depending on your company's Connector configuration, you may be able to send content out for translation either immediately or via a queue.
  - ▣ Send content immediately to the translation provider.
  - ▣ Send content via the **Translation Queue**, which enables you to group items together by project and priority, target language, and require additional approval. For details, see "Submitting Content for Translation from the Translation Queue" on page 62.

## 2.1.2 Optimizing Translation Costs (Use Local TM)

The **Use Local TM** feature helps you reduce translation costs, by reducing the quantity of content that Connector sends to translation providers. With this feature, the Connector sends *only* changed content fields out for translation. To do this, it checks each field of the source version for any content changes.

However, this feature needs Connector translation backup data, and it increases the Connector processing time before sending out the items for translation. For information on enabling Connector translation backup data, refer to the *Clay Tablet Connector for Sitecore Installation and Configuration Guide*.

This feature is available:

- by selecting the **Use Local TM** check box in the **Translation Options** page of the **Bulk Translation** wizard, as described in "[Sending Multiple Content Items for Translation](#)" on page 46.
- by selecting the **Use LocalTM** check box in the **Automatic Item Export for Translation** dialog box, as described in "[Submitting a Content Item for Translation using the Content Editor](#)" on page 35 and "[Submitting Content for Translation from the Page Editor or the Experience Editor](#)" on page 41.

## 2.1.3 Selecting a Translation Provider

If your company has multiple translation providers, your company's Connector setup may enable you to select which one to use when you send out items for translation.

This feature is available:

- in the **Translation Queue**, as described in "[Submitting Content for Translation from the Translation Queue](#)" on page 62.
- in the **Translation Options** page of the **Bulk Translation** wizard, as described in "[Sending Multiple Content Items for Translation](#)" on page 46.
- when sending an individual content item for translation from the **Sitecore Content Editor**, as described in "[Submitting a Content Item for Translation using the Content Editor](#)" on page 35.
- when sending an individual content item for translation from the **Sitecore Page Editor**, as described in "[Submitting Content for Translation from the Page Editor or the Experience Editor](#)" on page 41.

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## 2.2 The Connector at a Glance

You access the Clay Tablet Connector for Sitecore ("Connector") directly from the Sitecore user interfaces—from the Content Editor, the Experience Editor (Sitecore 8 only), the Page Editor (Sitecore 6 and 7 only), and the Desktop (Sitecore 6 and 7 only).

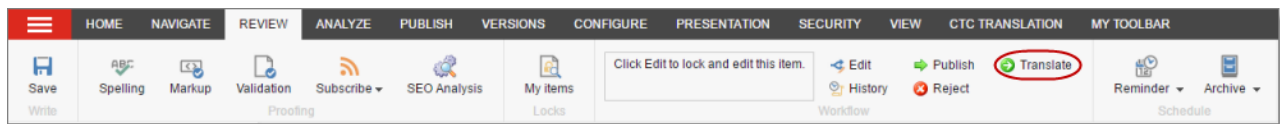
**Note:** Not all Connector features are available in all Sitecore user interfaces.

### Sitecore Content Editor

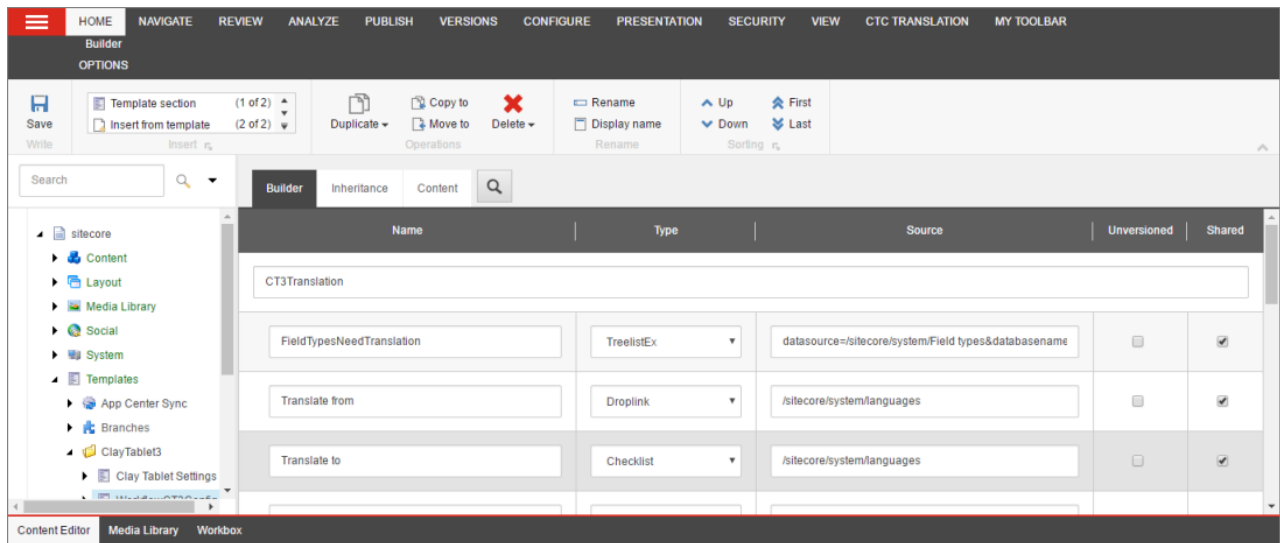
- You can use the **CTC Translation** tab in the Sitecore Content Editor to perform multiple translation-management tasks and to view a summary of the translation status of all the content items in your Sitecore instance:



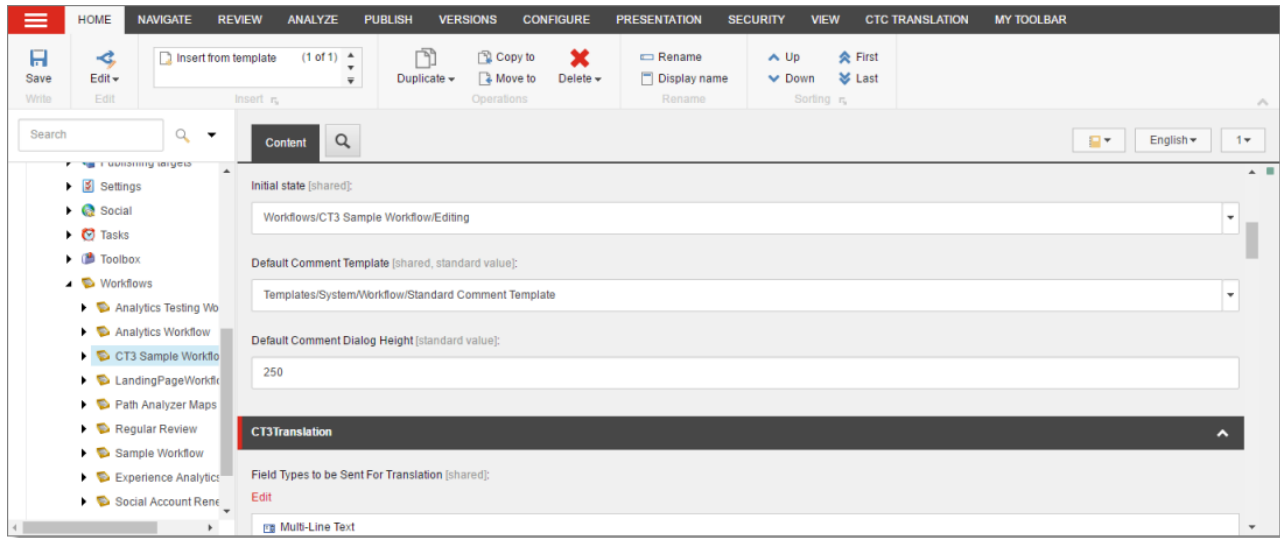
- You can use the **Translate** button in the **Review** tab in the Sitecore Content Editor to send out a single item for translation:



- You can use the `WorkflowCT3Config` template to build your own translation workflow:

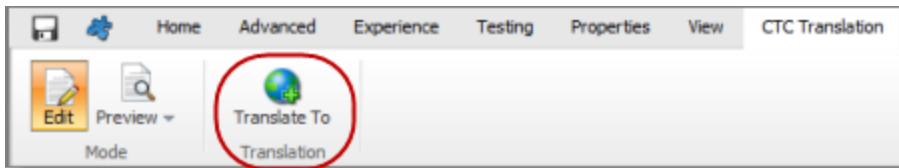


- You can use the `CT3 Sample Workflow` workflow to configure your translation workflow:



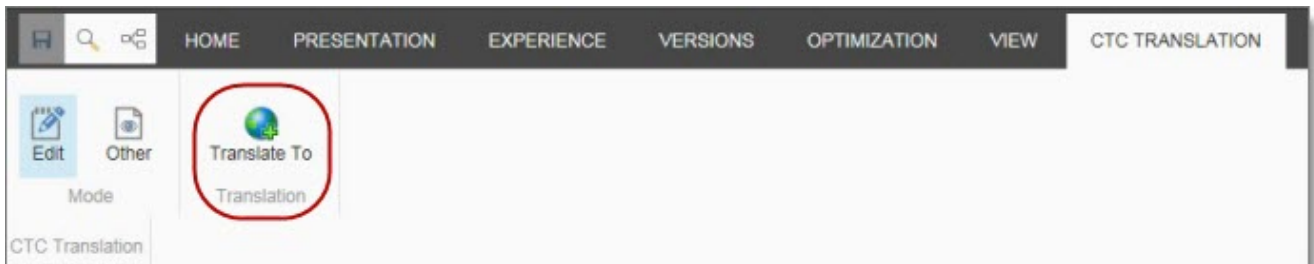
### Sitecore Page Editor (Sitecore 6 and 7)

You can use the **Translate To** button on the **CTC Translation** tab in the Sitecore Page Editor to send a single content item for translation:



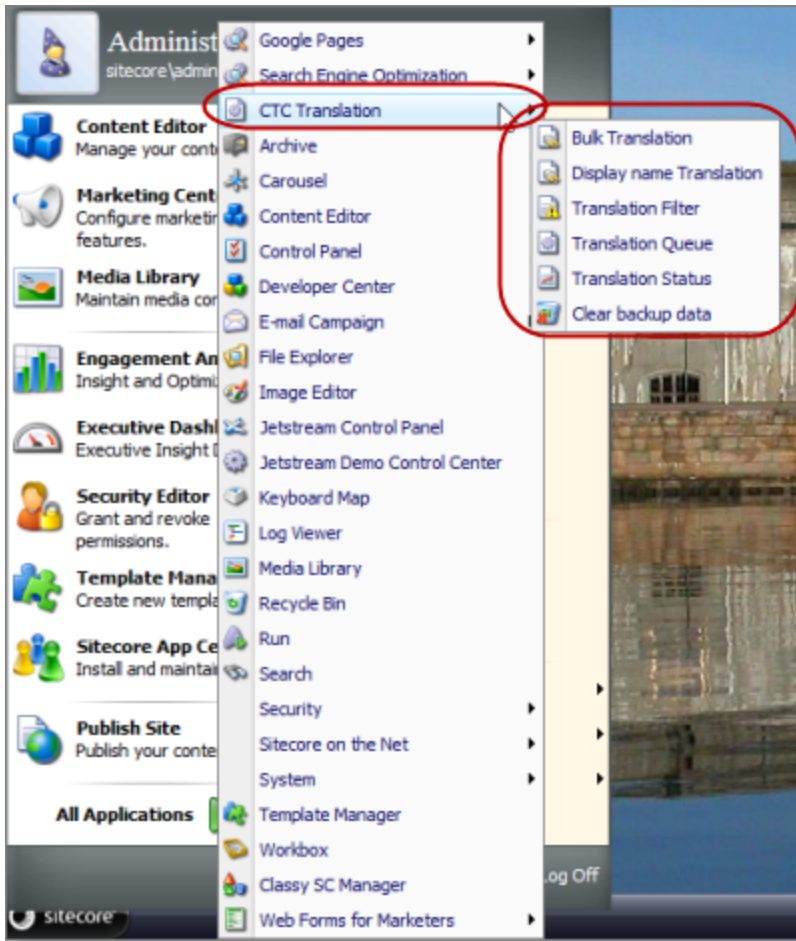
### Sitecore Experience Editor (Sitecore 8)

You can use the **Translate To** button on the **CTC Translation** tab in the Sitecore Experience Editor to send a single content item for translation:



### Sitecore Desktop (Sitecore 6 and 7)

You can use the menu items in the **CTC Translation** folder on the Sitecore menu.



## 2.3 Working with Lists

The Connector has many list pages, often for displaying lists of content items.

**Tips:** For lists where you can select multiple items, press the `Shift` key to select a range of adjacent items. Press the `Ctrl` key to select multiple non-adjacent items.

You can perform the following actions in list pages:

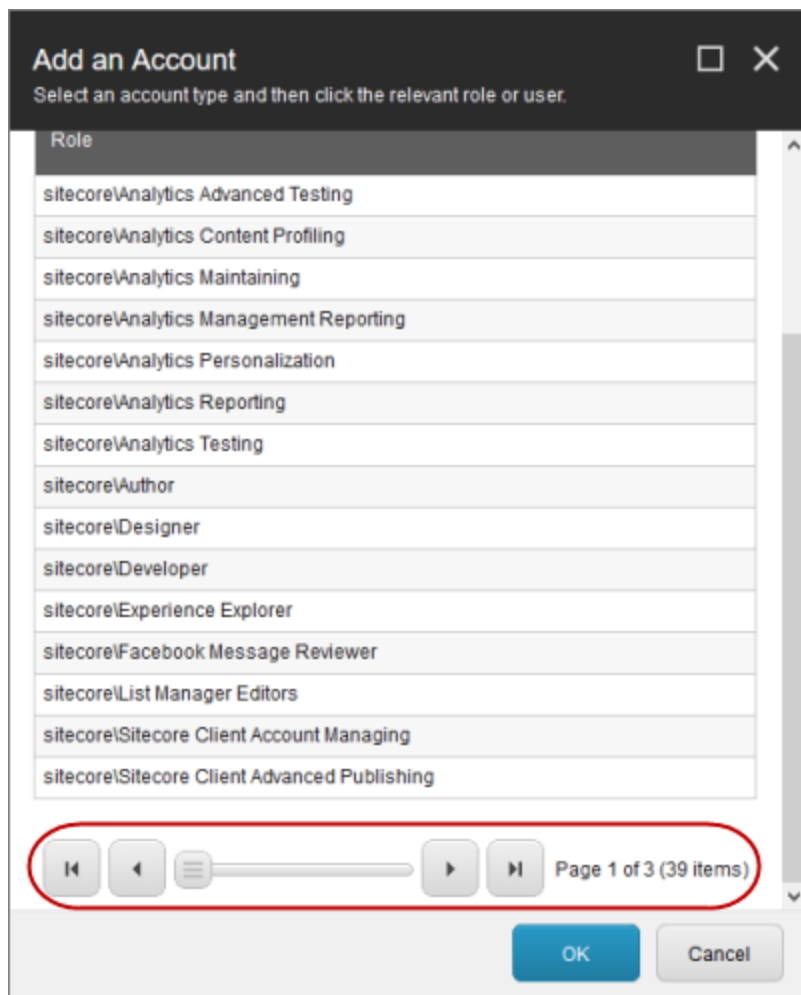
- ▶ A list with many items may have multiple pages. You can navigate among pages in a list. For details, see ["Navigating Pages in a List"](#) on page 16.
- ▶ You can set the width of a column in the list. For details, see ["Setting Column Width"](#) on page 17.
- ▶ You can change the column order. For details, see ["Changing Column Order"](#) on page 18.
- ▶ You can sort the items in the list by a specific column. For details, see ["Sorting by Column"](#) on page 17.

- ▶ You can search for an item in the Translation Status window. For details, see "[Monitoring Status for Multiple Items](#)" on page 71.
- ▶ You can specify the number of items to display in a single page in the Translation Status window. For details, see "[Monitoring Status for Multiple Items](#)" on page 71.
- ▶ You can group the items in the list by one of the columns in the Translation Status window. For details, see "[Grouping Content Items by Column](#)" on page 19.

### 2.3.1 Navigating Pages in a List





If there are many items in a list, the list may have multiple pages. The navigation bar below the list helps you navigate through the pages and displays your position in the list.

For example, the **Add an Account** dialog box may have multiple pages in its list.



You use the arrow keys at the bottom of a list to navigate through multiple pages in a list.



Arrow Key	What It Does
	Opens the first page.
	Opens the previous page.
	Opens the next page.
	Opens the last page.

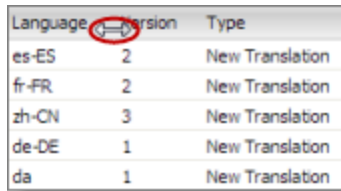
The bottom right corner of the windows displays the current page in the list, the total number of pages in the list, and the total number of items in the list. The maximum number of items displayed in a list page depends on the particular list.

### 2.3.2 Setting Column Width

You can set the width of any column in a list.

1. Mouse-over the right border of the column.

The cursor is displayed as a white line with arrows at each end.



Language	Version	Type
es-ES	2	New Translation
fr-FR	2	New Translation
zh-CN	3	New Translation
de-DE	1	New Translation
da	1	New Translation

2. Drag the column border to its new position.

- Dragging the column border to the left makes the column narrower.

- Dragging the column border to the right makes the column wider.

### 2.3.3 Sorting by Column

By default, items in a list are displayed by alphabetical order of the item in the first column of the list.

You can sort items in a list by any column. For example, suppose that in the Translation Status window, you want to display all content items by language.

- ▶ Click the column heading.

For example, click the **Language** column heading.

Language	Version	Type
es-ES	2	New Translation
fr-FR	2	New Translation
zh-CN	3	New Translation
de-DE	1	New Translation
da	1	New Translation

The first time you click in the column heading, the column contents are sorted in ascending order. The arrow in the column heading indicates the sort order.

Language	Version	Type
da	1	New Translation
de-DE	1	New Translation
es-ES	2	New Translation
fr-FR	2	New Translation
zh-CN	3	New Translation

- If you want to reverse the sort order, click again in the column heading.

Language	Version	Type
zh-CN	3	New Translation
fr-FR	2	New Translation
es-ES	2	New Translation
de-DE	1	New Translation
da	1	New Translation

### 2.3.4 Changing Column Order

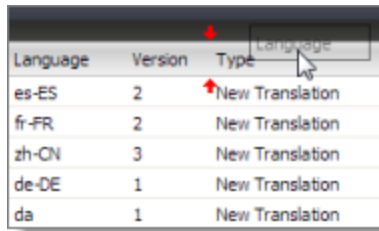
You can change the order in which columns in lists are displayed. For example, suppose you want to move the **Language** column to the right of the **Version** column.

1. Click the column heading to move.

For example, click the **Language** column heading.

Language	Version	Type
es-ES	2	New Translation
fr-FR	2	New Translation
zh-CN	3	New Translation
de-DE	1	New Translation
da	1	New Translation

2. While you hold down the cursor, drag the column heading to the new position. (A copy of the column heading "floats" above the table.) Red arrows indicate the new position of the column.



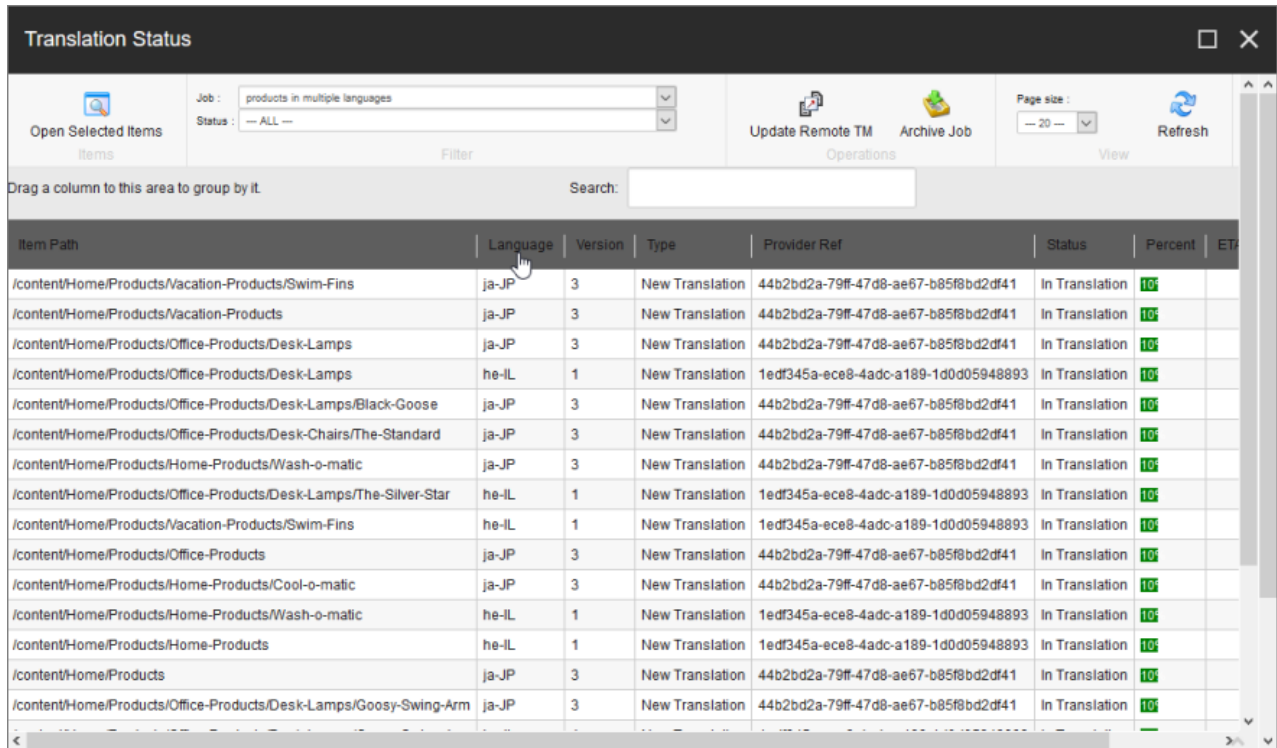
3. Release the cursor when the column is in its new position.

Version	Language	Type
2	es-ES	New Translation
2	fr-FR	New Translation
3	zh-CN	New Translation
1	de-DE	New Translation
1	da	New Translation

## 2.4 Grouping Content Items by Column

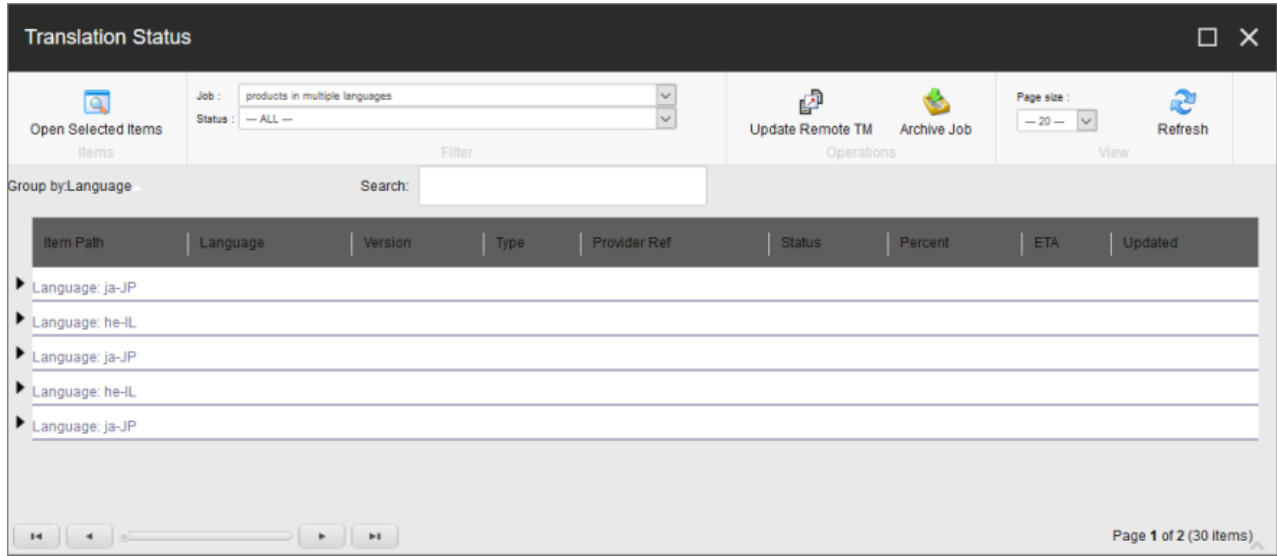
In the Translation Status window and the Translation Queue, you can group the items by one of the columns. The example below shows how to group the content items in the Translation Status window by the Language column.

1. Click the column heading. For example, click the **Language** column heading.

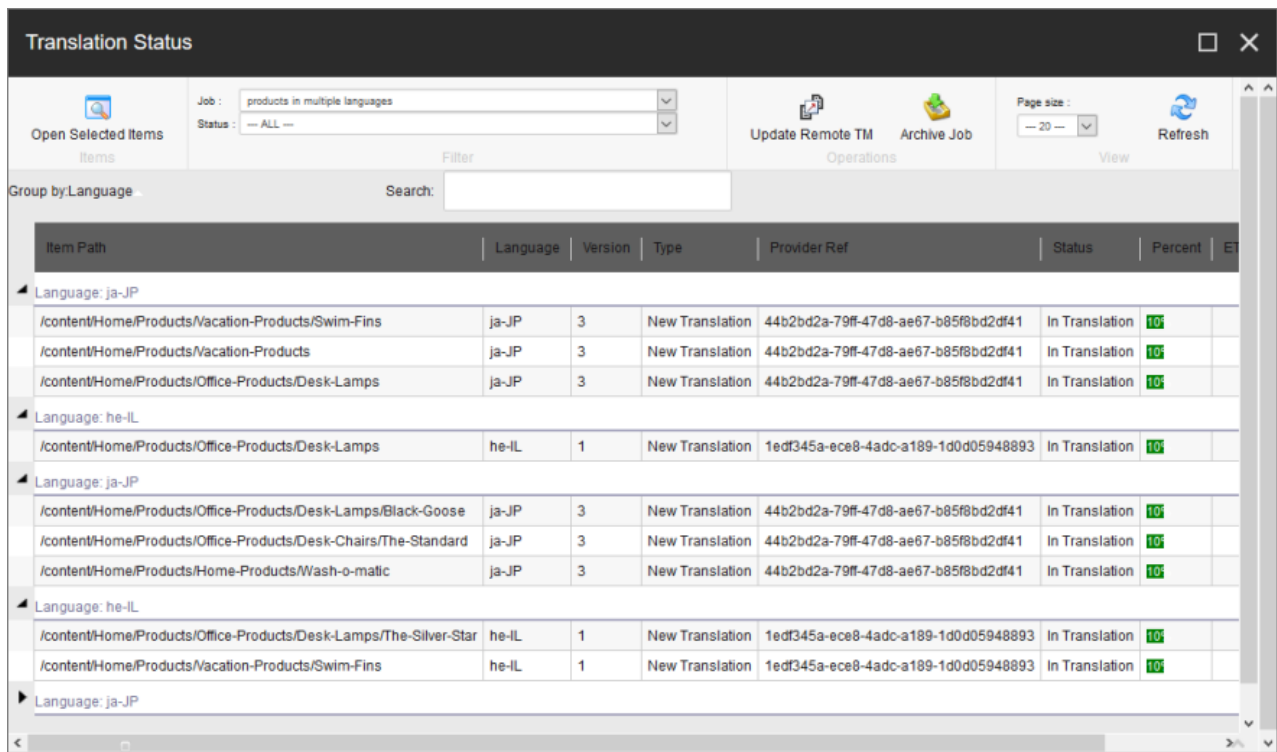


- While you hold down the cursor, drag the column heading to the **Drag a column to this area to group by it** area above the list on the left.

This list items are grouped by the column you dragged.



- Click an Expand button to view the items in each column group.



For a detailed description of the Translation Status window, see ["Monitoring Status for Multiple Items"](#) on page 71.

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## 3 Creating Content for Translation

- If you are sending a single content item for translation, it must have a translation workflow assigned.
  - ▣ There are three ways to do this when you create a content item:
    - ▣ Assign it to the `sitecore/System/Templates/ClayTablet3/WorkflowCT3Config` template. This template uses the translation workflow, which is contained in the `sitecore/System/Workflows/CT3 Sample Workflow`.
    - ▣ Assign it to your own template. Ensure that your template uses the translation workflow, which is contained in the `sitecore/System/Workflows/CT3 Sample Workflow`.
    - ▣ Assign it to your own template, which uses your own workflow. Ensure that the base template of your workflow is `/sitecore/templates/System/Workflow/TranslationWorkflow`. For detailed instructions, refer to the *Clay Tablet Connector for Sitecore Installation and Configuration Guide*.
  - ▣ If a content item was already created, but a translation workflow was not assigned to it, you must assign a translation workflow to that item. For details, see page 26.
- If you are sending multiple content items together using the Bulk Translation feature, you do not need to assign a translation workflow to individual content items. You can assign a translation workflow and assign a workflow state to all items without an assigned workflow. For details, see "[Sending Multiple Content Items for Translation](#)" on page 46.

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### 3.1 Attaching a New Content Item to a Translation Workflow

To create an item that you can send for translation individually, you must either use a template that has the Clay Tablet workflow attached, or use a template that is attached to your custom translation workflow.

**Note:** If you will be sending an item for translation using the Bulk Translation feature, described in "[Sending Multiple Content Items for Translation](#)" on page 46, you do not need to assign a template with a translation workflow to the item.


1. In the **Sitecore Content Editor**, under **Content** in the navigation pane, locate the place in the tree where you want to create a new item that will be sent for translation. Next, right-click and select **Insert > Insert from Template** in the context menu.

The **Insert from Template** dialog box opens.

2. Select one of the following templates:
  - ▣ The template attached to the default Connector workflow, `Templates/ClayTablet3/WorkflowCT3Config`.
  - ▣ The template attached to your custom translation workflow, if you have created one.
3. Click **Insert**.

The item opens, displaying the **Content** tab.

4. Enter the content to translate in the **Data** section.
5. In the **CT3Translation** section, specify the following workflow options:

Parameter	Description	Default Value
Field Types to be Sent For Translation	<p>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.</p> <p><b>Note:</b> You cannot set <i>Shared Fields</i> to be sent out for translation, because these fields are shared across all versions and languages of an item.</p> <p>To change these fields, click the <b>Edit</b> 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 <b>Selected</b> column. When you are done, click <b>OK</b>.</p> <p><b>Tip:</b> You can use the <i>Shift</i> key to select multiple adjacent field types.</p>	<p>By default, the Connector sends out fields of the following field types for translation:</p> <ul style="list-style-type: none"> <li>■ text</li> <li>■ Rich Text</li> <li>■ html</li> <li>■ Single-Line Text</li> <li>■ Multi-Line Text</li> </ul>
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

Parameter	Description	Default Value
Use Local TM (detect changed content and resend)	<p>Determines whether the <b>Use Local TM</b> 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 <i>only</i> changed content fields out for translation, to ensure that all target versions reflect these changes.</p> <ul style="list-style-type: none"> <li>■ When this check box is selected, you can activate this feature by selecting a check box in either the <b>Bulk Translation</b> wizard or the <b>Automatic Item Export for Translation</b> dialog box. The <b>Use Local TM</b> 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.</li> <li>■ 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.</li> </ul>	check box is cleared
Requested Translation Timeframe (Days)	<p>Determines the translation deadline when sending out the translation automatically, without using the user interface that supports entering this information in the <b>Delivery Date</b> 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.</p> <p><b>Recommendation:</b> Discuss whether to use this feature with your translation provider(s).</p>	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

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 <i>source</i> item after the Connector has sent it out for translation. For example, in some companies, when you send out the content for translation, the <i>source</i> is ready for publishing. In this scenario, you can set this state to <i>Done</i> , 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 <i>target content</i> when an item is being translated. The default <i>In Translation</i> 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. 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



Parameter	Description	Default Value
Send Content automatically using pre-configured language settings	<p>Enables sending all items to the Translation Queue without further user action. That is, the Connector automatically uses the <b>Translate from, Translate to</b> and <b>Requested Translation Timeframe</b> 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.</p> <ul style="list-style-type: none"> <li>■ If this check box is selected, the <b>Language Selection</b> 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.</li> <li>■ If this check box is cleared, the <b>Language Selection</b> 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.</li> </ul>	check box is cleared
Automatically Publish content when it reaches the Final State	<p>Determines whether the Connector automatically publishes the content when an item reaches the final state of the translation workflow.</p> <ul style="list-style-type: none"> <li>■ If this check box is selected, the Connector automatically publishes the content when an item reaches the final state.</li> <li>■ If this check box is cleared, the Connector does not automatically publish the content when an item reaches the final state.</li> </ul>	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?	<p>Determines whether the Connector publishes child items when it publishes their parent item.</p> <ul style="list-style-type: none"> <li>■ If this check box is selected, the Connector publishes child items when it publishes their parent item.</li> <li>■ If this check box is cleared, the Connector does not publish child items when it publishes their parent item.</li> </ul>	check box is selected

## 3.2 Attaching a Translation Workflow to an Existing Content Item


If you have a content item that is attached to a template that does not include a translation workflow, you can still prepare to send it out for translation individually. To do so, you assign a translation workflow to the content item.

**Note:** You can assign a translation workflow to a content item only if you can assign a workflow to that content item. This means that the content item must inherit the `workflow` data item from its data template. For more information, refer to the *Sitecore Data Definition Reference*. 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.

To attach a translation workflow to an existing content item:

1. In the **Sitecore Content Editor**, navigate to the content item to which you want to attach a translation workflow and select it.
2. In the Sitecore Content Editor ribbon, click the **Review** tab.
3. In the **Workflow** section, click **Edit**.

**Tip:** If the Workflow section is not visible, then in the Sitecore Content Editor ribbon, click the **View** tab and select the **Standard Fields** check box.

4. In the **Content** tab, scroll down to the **Workflow** section.
5. If necessary, click the Expand button  to expand the Workflow section.



The screenshot shows the 'Workflow' section in the Sitecore Content Editor. It includes the following fields:

- Workflow [shared]:** A dropdown menu.
- State:** A dropdown menu.
- Lock:** A text area containing the XML code: `<r owner="sitecore\admin" date="20170425T172045Z" />`
- Default workflow [shared]:** A dropdown menu.

6. In the **Workflow** field, click the arrow to select `CT3 Sample Workflow` or another translation workflow.
7. Optional. In the **State** field, click the arrow to select the workflow state.

- In the **Review** tab on the Sitecore Content Editor ribbon, in the **Workflow** section, click **Check In**.

### 3.3 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** (Sitecore 6 and 7 only).

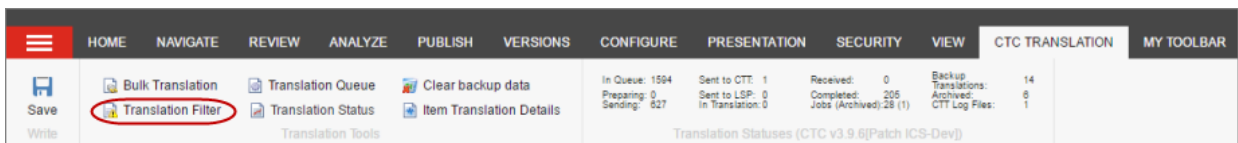
You initially specify which types of fields the Connector sends for translation using the **Field Types to be Sent For Translation** workflow-level parameter. For details, see "[Attaching a New Content Item to a Translation Workflow](#)" on page 21.

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.

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

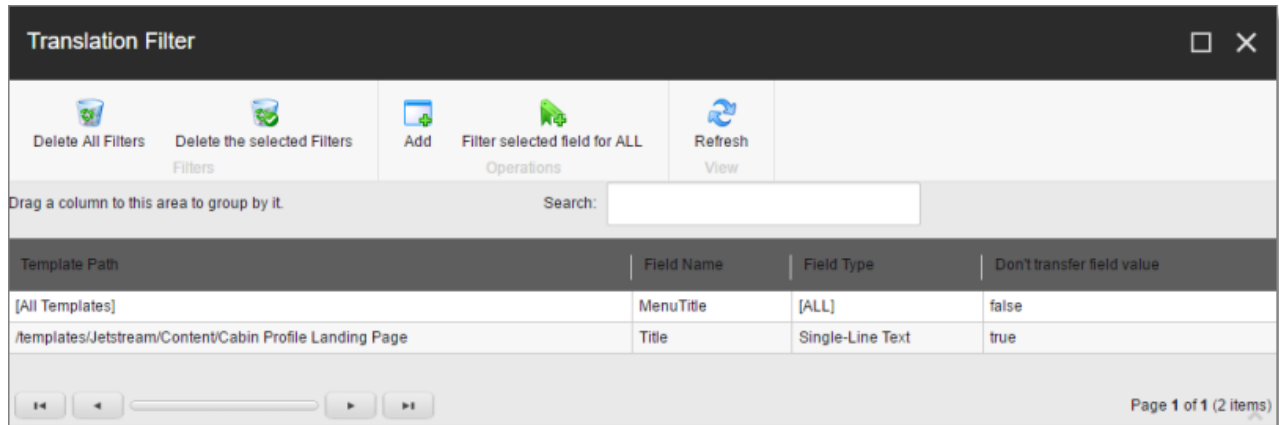
- In the Sitecore Content Editor ribbon, click the **CTC Translation** tab, and then in the **Translation Tools** section, click **Translation Filter**.



- In the Sitecore Desktop, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Filter** from the menu. (Sitecore 6 and 7 only)

The **Translation Filter** window opens.

- If you use the Sitecore Content Editor in Sitecore 6 or 7, it opens in a separate browser window.
- If you use the Sitecore Content Editor in Sitecore 8 or the Sitecore Desktop, it opens in the same browser window.

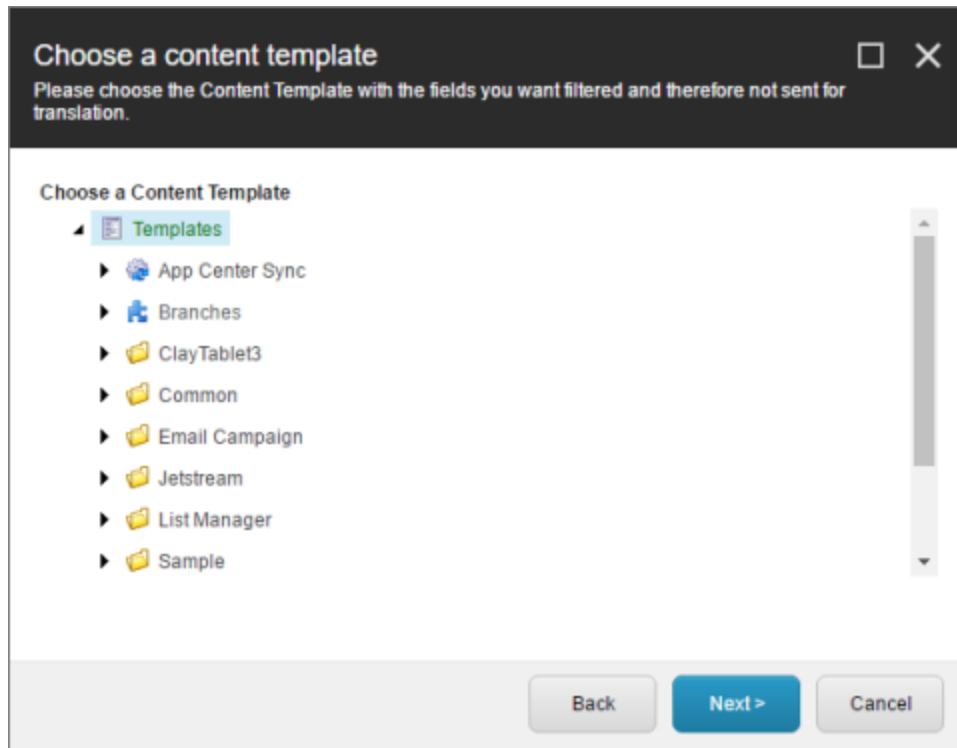




2. Click the **Add** button  to add a new filter.

The **Welcome** page of the **Field Filter** wizard opens.

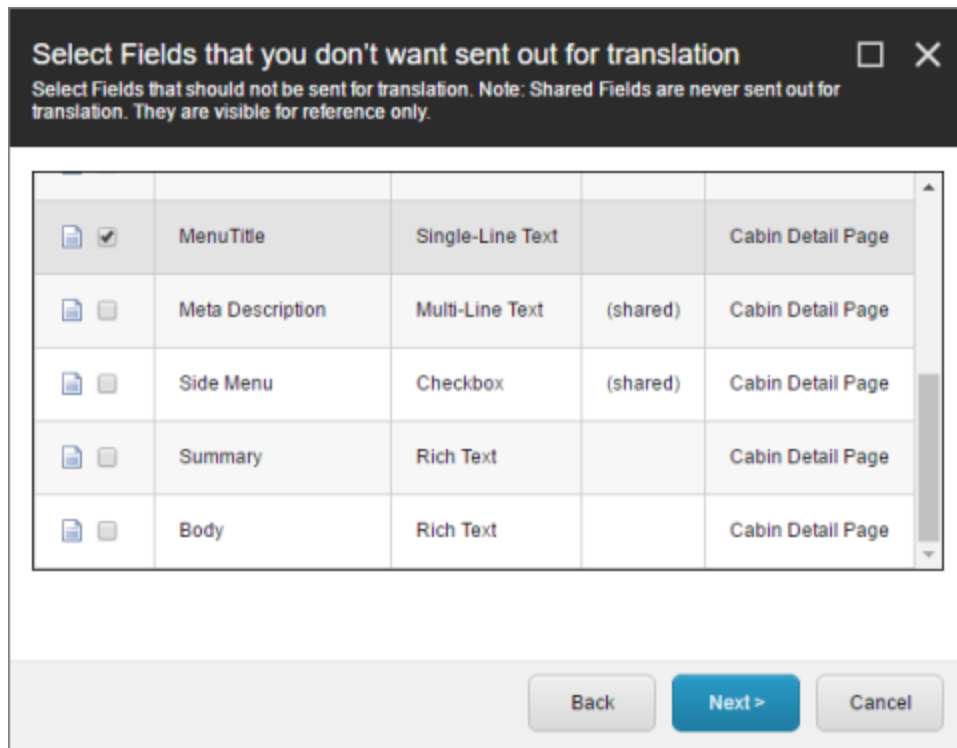
3. Click **Next**.

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.



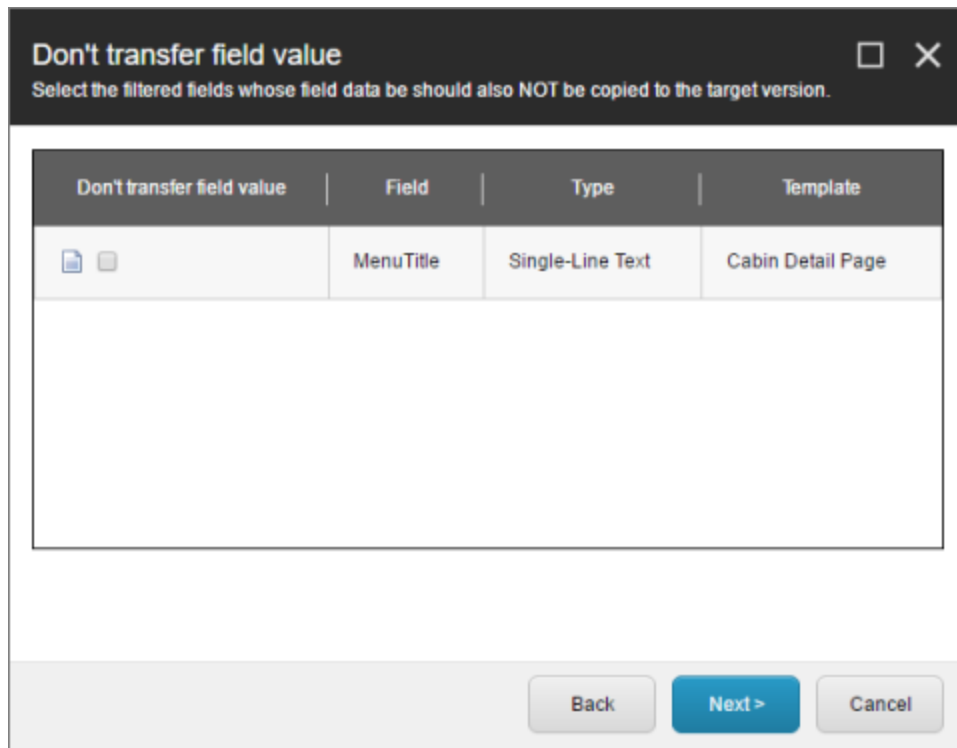
This page displays the following information about all the fields in the template you selected:

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.

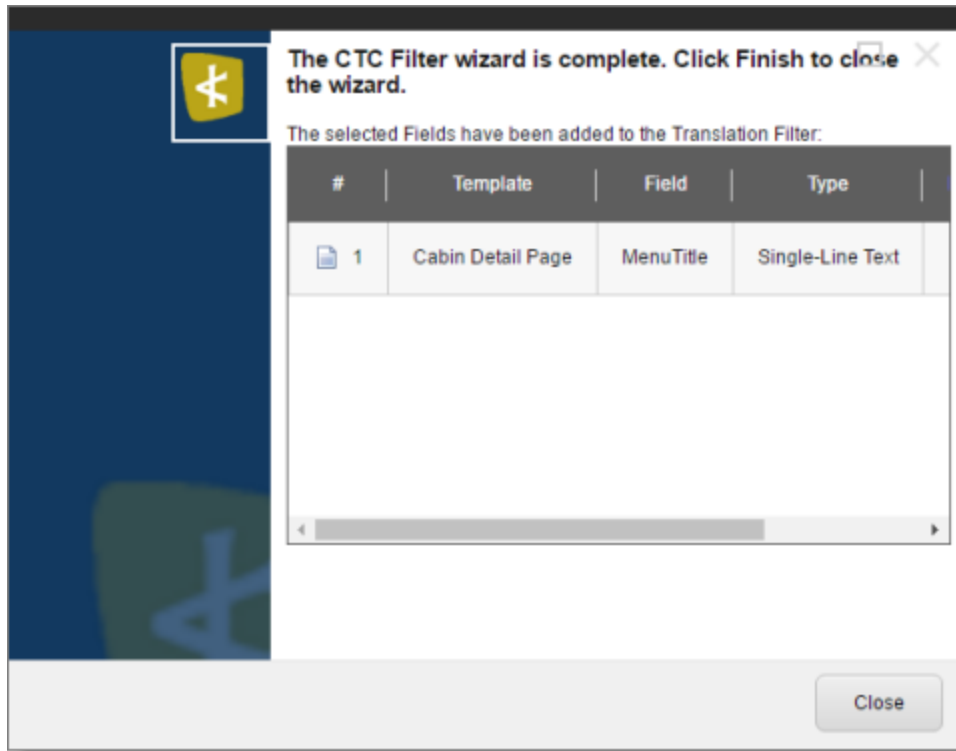


This page displays only the field types you selected in the previous page of the wizard.

6. For each field type, indicate whether you want the Connector to copy the source-language content to the target version.
  - If you do not 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 excluded from the target content.
  - If you 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 included in the target content; however, the content will be in the source language.

Click **Next**.

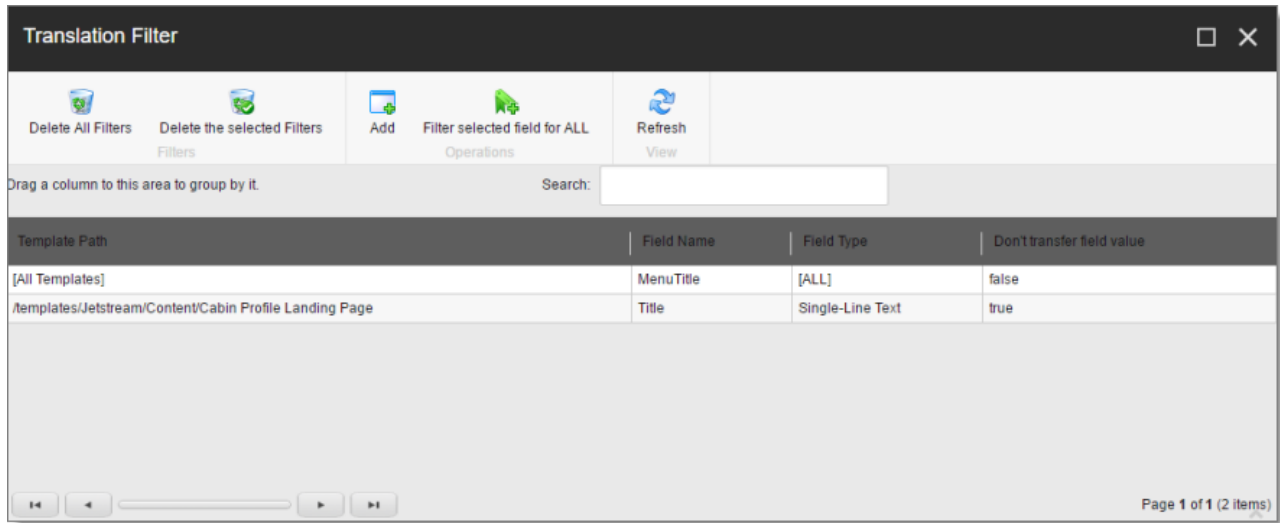
The summary page of the wizard opens.



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	<p>Indicates whether the Connector copies the source-language content to the target version for this field type.</p> <ul style="list-style-type: none"> <li>■ Blank indicates that the Connector <i>does</i> 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.</li> <li>■ <i>yes</i> indicates that the Connector <i>does not</i> 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.</li> </ul>

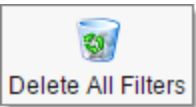
7. Click **Finish**.
8. Sitecore 8 only. A message box opens, confirming that you want to close the wizard. Click **OK**.  
The wizard closes, and the **Translation Filter** window displays each filter you created in a separate row:



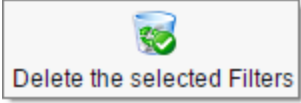


This window displays the following information about the filters:

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. <ul style="list-style-type: none"> <li>■ false indicates that the Connector <i>does</i> 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.</li> <li>■ true indicates that the Connector <i>does not</i> 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.</li> </ul>

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.



Button	Description
 A button with a trash can icon and the text "Delete the selected Filters".	Deletes all selected filters from the CTC Translation Filter window.
 A button with a green mouse cursor icon pointing to a plus sign and the text "Filter selected field for ALL".	Applies the selected filter to all templates with the same field type.
 A button with a blue circular refresh icon and the text "Refresh".	Refreshes the list of displayed filters.

## 4 Sending Content to Translation

If you send a single content item for translation, it must be in a workflow state that enables it to be sent for translation. This corresponds to the `Reviewing` workflow state that is part of the default `CT3 SampleWorkflow` translation workflow. If you send multiple content items for translation using the Bulk Translation feature, you can assign a workflow and workflow state to the items at that time.

When the Connector sends out content items for translation, the following events occur:

1. The Connector exports the content from the Sitecore CMS as HTML or XML files. The format is determined by the `ClayTablet.PackedFileFormat` setting in the `CT3Translation.config` file. For details, refer to the *Clay Tablet Connector for Sitecore Installation and Configuration Guide*.
2. The Connector creates placeholders for the content of the language versions of the specified target languages.
3. The Connector delivers the export files to the Clay Tablet Platform, along with information about the target languages, and source location within Sitecore. The Clay Tablet Platform then delivers these files to the translation provider(s) specified in your company's routing rules.

**Note:** Using the translation workflow for a content item does not obligate you to send out that content item for translation. You can move the content item through the entire workflow without sending it out for translation.

### 4.1 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.

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.

## 4.2 Submitting a Content Item for Translation using the Content Editor

This section describes how to submit a content item for translation using the Sitecore Content Editor. It is relevant only for a single content item that uses a template that has a translation workflow attached, as described in "Creating Content for Translation" on page 21. For instructions on submitting multiple content items for translation, see "Sending Multiple Content Items for Translation" on page 46. For instructions on submitting a single content item for translation using the Sitecore Page Editor, see page 41.

Depending on your company's Connector configuration, when you submit the item for translation, either:

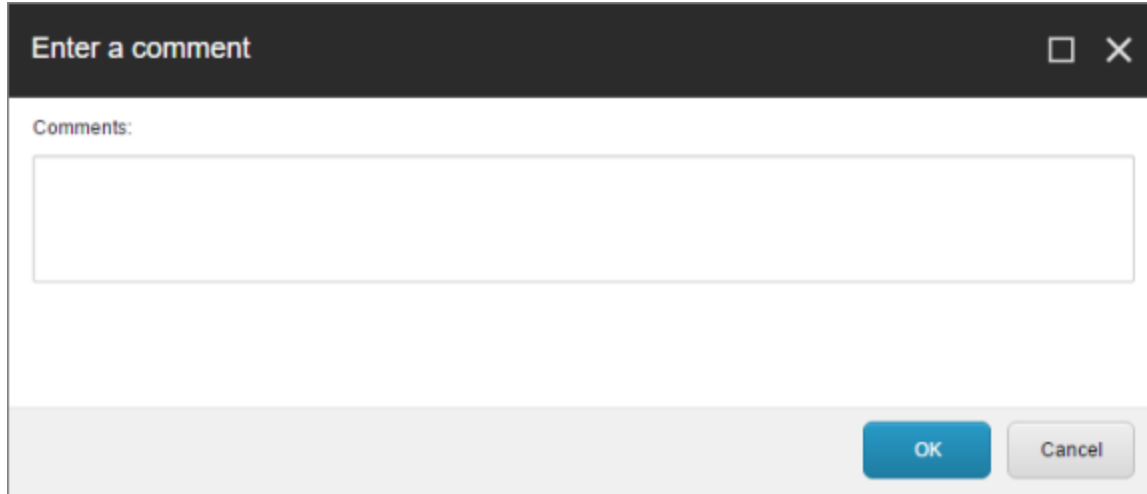
- The Connector immediately sends out the item for translation.
- The Connector sends the item to the Translation Queue, which is a holding area for items that are ready for translation.

To submit a content item for translation:

1. In the **Sitecore Content Editor**, navigate to the content item that is ready to be sent for translation and select it.
2. In the Sitecore Content Editor ribbon, click the **Review** tab.
3. In the **Workflow** section, click **Submit**.

**Note:** The **Submit** button is displayed only if the content item's workflow state is `Editing`.

A dialog box opens.

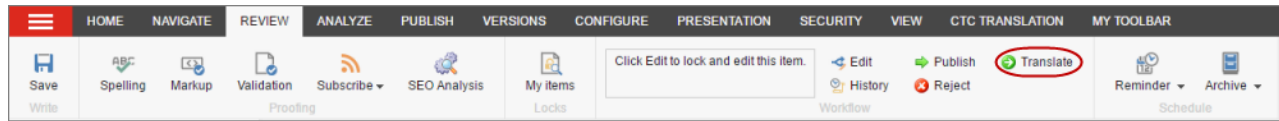


4. Optional. Add a comment to this action. The Connector does not use this comment, but it is available in Sitecore.

The content item moves to the next state in the workflow, which is `Reviewing`.

The **Workflow** section of the **Review** tab is updated to display the **Publish**, **Reject**, and **Translate** buttons.

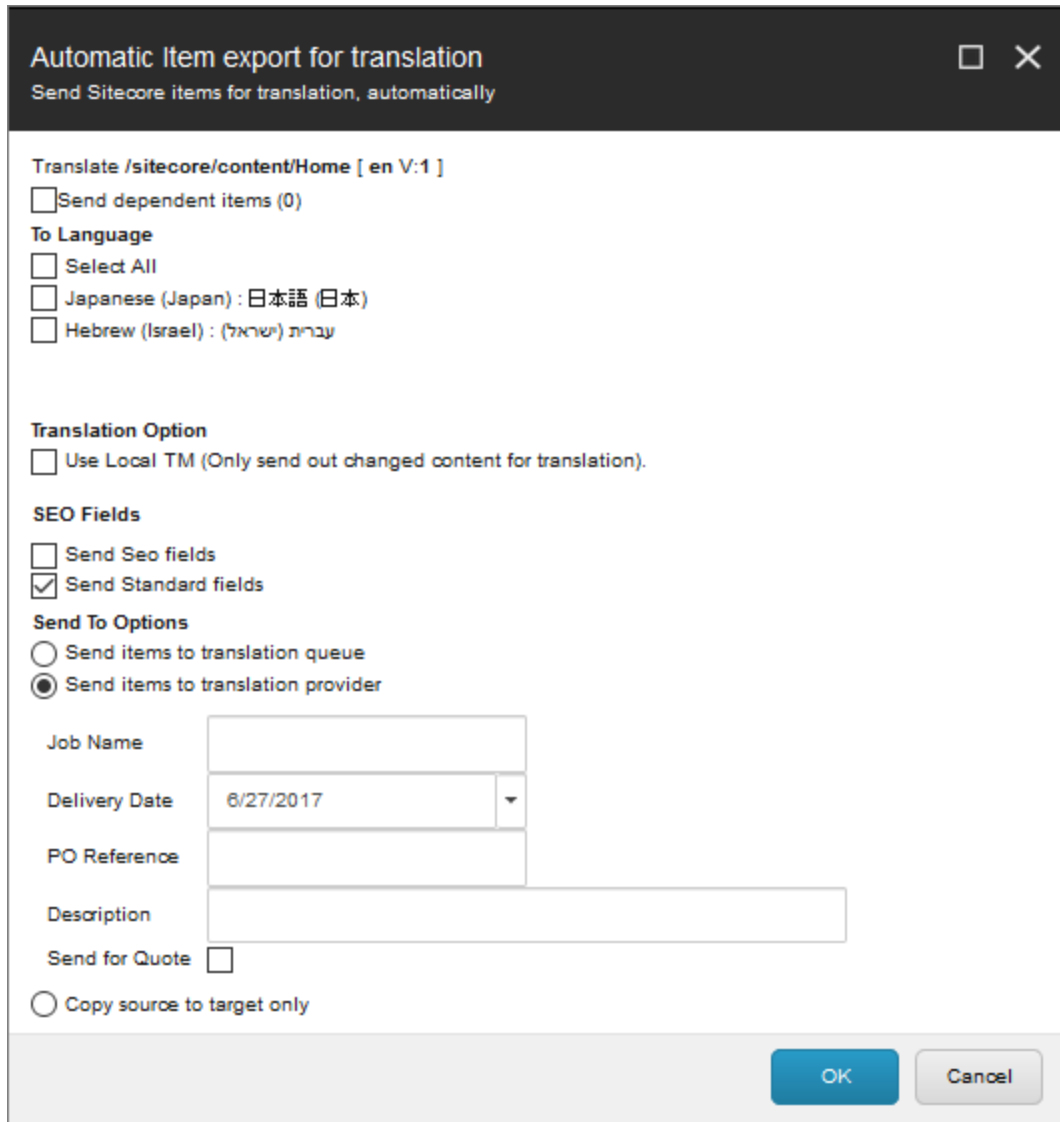
**Note:** These buttons are displayed only if the content item is in the `Reviewing` workflow state.



**Note:** Using the translation workflow for a content item does not obligate you to send out that content item for translation. You can move the content item through the entire workflow without sending it out for translation.

5. Click **Translate**.
6. Optional. Depending on your company's Sitecore configuration, an additional comment box may be displayed. If so, you can enter a comment and click **OK**.

The next step depends on your company's Connector configuration. Usually, the **Automatic Item Export for Translation** dialog box opens.



The following options may be available, depending on your company's Connector configuration:

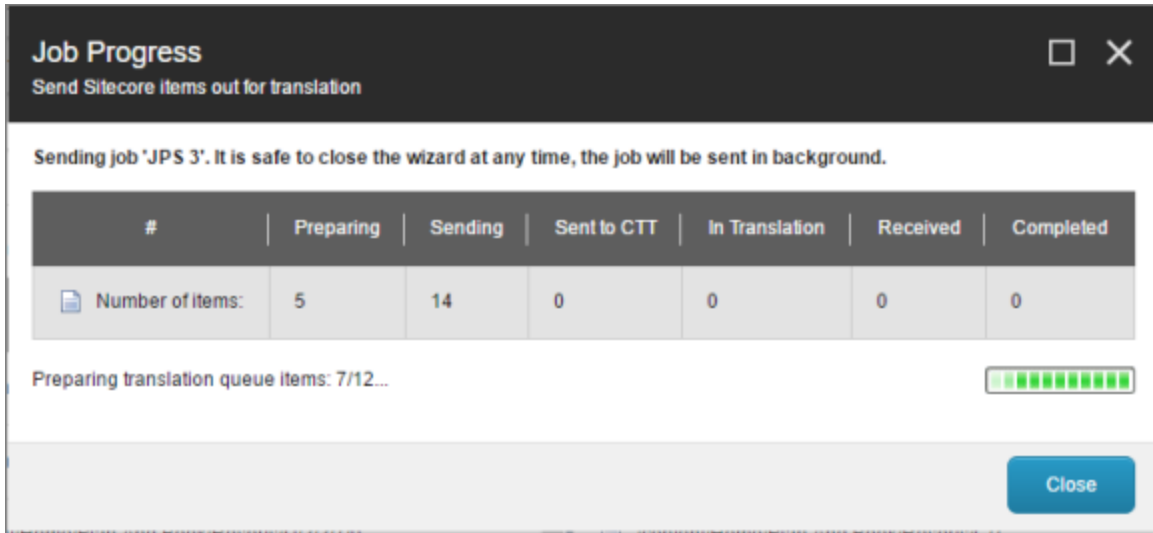
Option	Description
Send Dependent Items	Select this check box to include items from the layout and final layout that are dependent on the selected content item. This is useful, for example, if a page item has multiple layers with different data sources, and you want to translate all the items displayed in the page. The number in parentheses indicates the number of dependent items.

Option	Description
To Language	<p>Select the check boxes for the target languages into which you want to translate the content. If you want to translate the content into all available target languages, select the <b>Select All</b> check box.</p> <p><b>Tip:</b> When you select a target language, if an error states that the language code is misconfigured, it means that you do not have read access to that language. You require read access to a language to send out content for translation to that language.</p> <p><b>Note:</b> Depending on your company's Connector configuration, some languages may already be selected. If so, you can clear any selected languages that you do not want to include.</p>
Use Local TM	<p>Determines whether to check each field of the source version for any content changes, and send <i>only</i> changed content fields out for translation. If a field was previously translated and it has not changed, then the Connector does not send it for translation again: Instead, it uses the stored translation.</p> <ul style="list-style-type: none"> <li>■ When this check box is selected, the Connector sends <i>only</i> changed content fields out for translation. This may reduce translation costs, but it increases the processing time before the Connector sends out the items for translation.</li> <li>■ When this check box is cleared, the Connector sends all specified source content for translation, even if it has not changed since it was previously sent for translation.</li> </ul> <p><b>Note:</b> If the <b>Use Local TM</b> feature is enabled, the Connector checks each field of the source version for any content changes, and it sends <i>only</i> changed content fields out for translation, to ensure that all target versions reflect these changes. This option may also not be available based your company's Connector configuration. For details, refer to the description of the <b>Use Local TM</b> setting in the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
SEO Fields	<p>Select the check boxes for the types of content to send out for translation.</p> <ul style="list-style-type: none"> <li>■ <b>Send SEO fields:</b> The Connector sends fields defined in the <b>SEO Fields</b> section of the <b>Clay Tablet Settings</b> items for translation. Cleared by default.</li> <li>■ <b>Send standard fields:</b> The Connector sends the fields specified by the <b>Field Types to be Sent For Translation</b> parameter in the CT3 <i>Sample Workflow</i>. Selected by default.</li> </ul> <p>For more information, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
Select one of the following <b>Send To Options</b> :	
Send items to translation queue	<p>The Connector sends the content item to the Translation Queue, where a user must approve it to send it out for translation.</p>

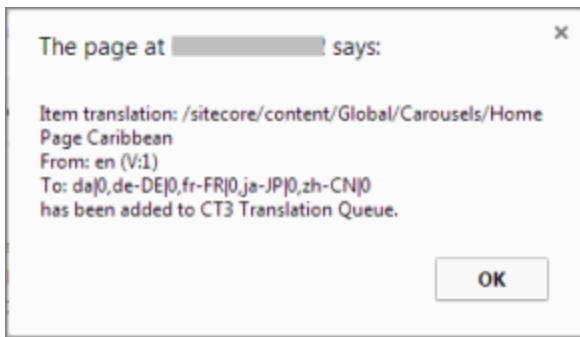
Option	Description
Send items to translation provider	<p>The Connector sends the content item to the Clay Tablet Platform, which sends it to the translation provider specified in the company's routing rules. The Connector displays additional fields below, where you can specify additional information.</p> <p><b>Recommendation:</b> Select this option if you need to quickly send out content and do not need to arrange or filter it, for example, by language.</p> <ul style="list-style-type: none"> <li>■ <b>Send To:</b> If your company has multiple translation providers, and if your company's Connector configuration enables selecting the translation provider (instead of using automatic routing rules), you can select the provider for this item in the dropdown list.</li> <li>■ <b>Job Name:</b> Your name for this translation job.</li> <li>■ <b>Delivery Date:</b> The requested translation deadline. This is the date when you expect the translated content to return. By default, it is two weeks from the current date. To select a different date, either type the delivery date in the field in MM/DD/YYYY format, or click the arrow and select a different date in the calendar that opens. This information is sent to the translation provider as metadata of the translation package. <ul style="list-style-type: none"> <li><b>Note:</b> The default displayed date is based on your company's Connector configuration.</li> <li><b>Recommendation:</b> Discuss with your translation provider whether to use the information in this field.</li> </ul> </li> <li>■ <b>PO Reference:</b> The purchase order reference number.</li> <li>■ <b>Special Instruction:</b> Any additional instructions for Lionbridge Freeway. Displayed only if Lionbridge Freeway is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Analysis Code:</b> The analysis codes for the translation. Displayed only if Lionbridge Freeway is selected in the <b>Send to</b> box, above. You specify the analysis codes that are relevant to your content. <p>Your Lionbridge setup determines which analysis codes are available for you to specify, and the values available for selection for each analysis code. In this example, the <i>Region</i>, <i>Department</i>, and <i>Priority</i> analysis codes are available for you to specify.</p> </li> <li>■ <b>Description:</b> A description of the translation job, including any special instructions or requests. Displayed only if a translation provider <i>other than Freeway</i> is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Send for Quote:</b> Select this check box to inform the translation provider that you want to receive a quote before the translation process starts. Displayed only if supported for the selected translation provider and enabled in your Connector installation.</li> </ul>
Copy source to target only	<p>The Connector copies the source content to the target content item without sending it out for translation. This is useful when there is content that you do not want to translate, but that you want to include in the target version. The Connector displays an additional field below, where you specify the job name.</p> <ul style="list-style-type: none"> <li>■ <b>Job Name:</b> Your name for this job.</li> </ul>

7. Click **OK** to close the dialog box and send the content item to the next step, as described above.

- If you sent the content item to a translation provider, or copied the source content to the target, the **Job Progress** box opens, indicating the Connector's progress in sending out the item for translation or copying over the content. Each target language represents an item. Click **Close** at any time to close the Job Progress box. The processing and sending continues in the background.



**Important:** If the Connector sent the item to the Translation Queue, you must approve it there to send it out for translation. For detailed instructions, see ["Submitting Content for Translation from the Translation Queue"](#) on page 62.



**Note:** The Connector never sends out shared fields for translation, because these fields are shared across all versions and languages of an item.

For information about the events that occur when the Connector sends out content for translation, see ["Sending Content to Translation"](#) on page 34.

**Tip:** You can monitor the translation progress from within the Sitecore Content Editor. For detailed instructions, see ["Monitoring Translation Status"](#) on page 69.



## 4.3 Submitting Content for Translation from the Page Editor or the Experience Editor

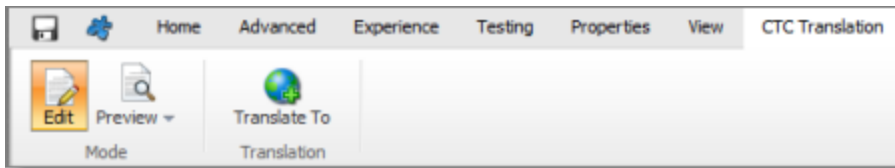
This section describes how to submit a content item for translation using the Sitecore Page Editor (Sitecore 6 and 7) or the Sitecore Experience Editor (Sitecore 8). Depending on your company's Connector configuration, when you submit the item for translation, either:

- The Connector immediately sends out the item for translation.
- The Connector sends the item to the Translation Queue, which is a holding area for items that are ready for translation.

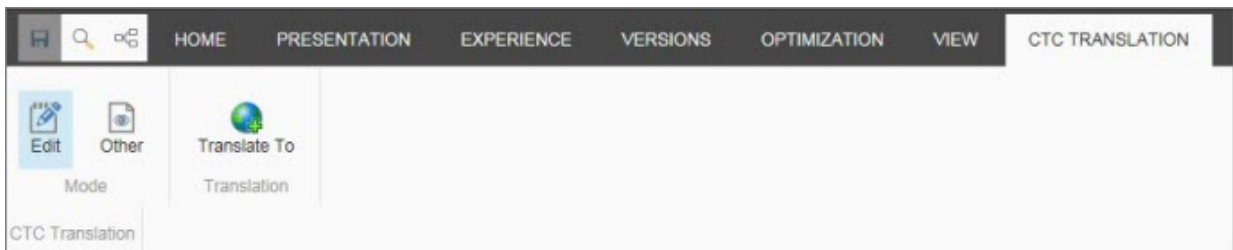
For instructions on submitting a content item for translation using the Sitecore Content Editor, see page 62.

1. Do one of the following:

- Sitecore 6 and 7: In the **Sitecore Page Editor** ribbon, click the **CTC Translation** tab.



- Sitecore 8: In the **Sitecore Experience Editor** ribbon, click the **CTC Translation** tab.

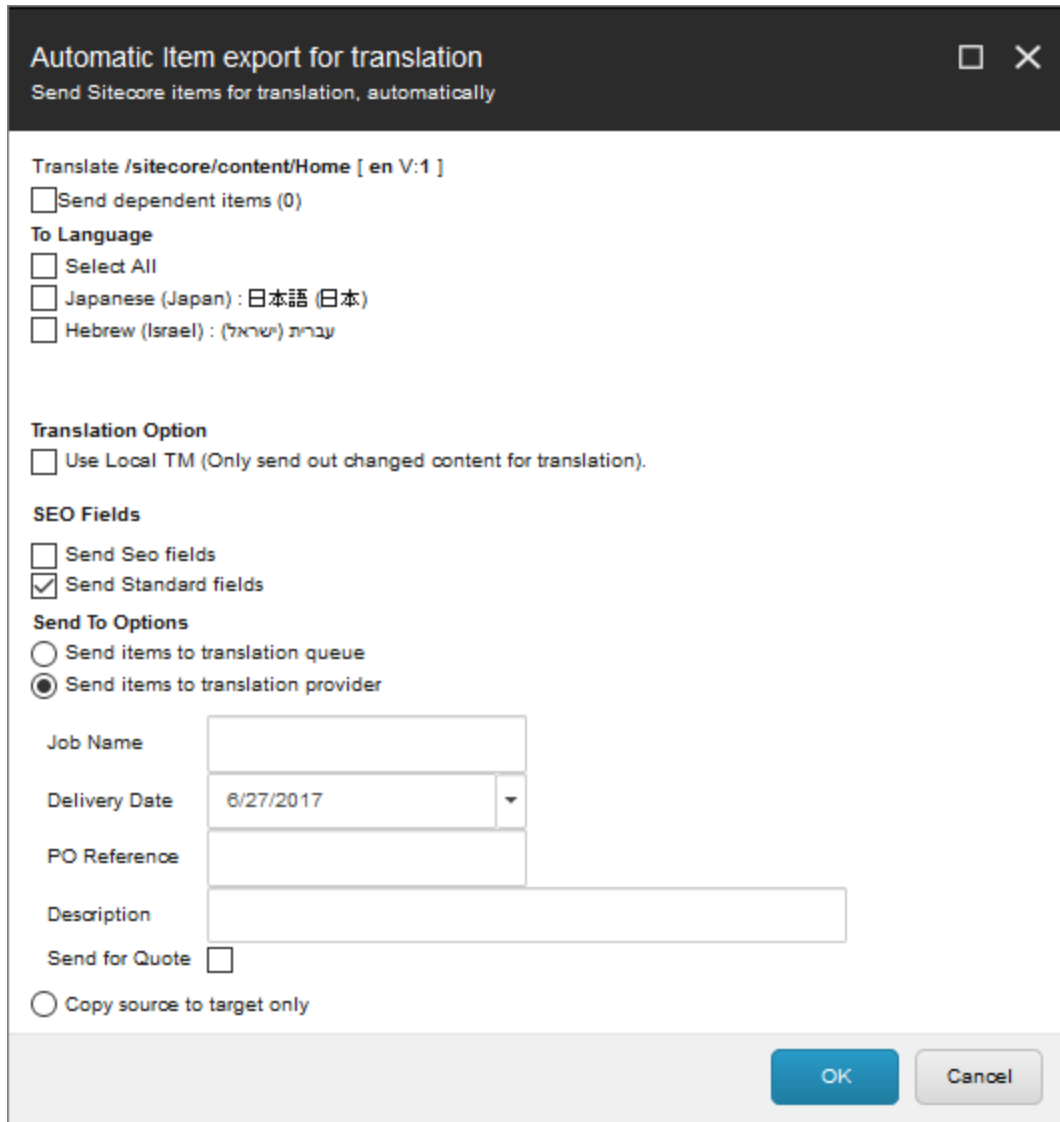


2. In the **Translation** section, click the **Translate To** button.

**Note:** This button is displayed only if the content item is in the *Reviewing* workflow state.

3. Optional. Depending on your company's Sitecore configuration, an additional comment box may be displayed. If so, you can enter a comment and click **OK**.

The **Automatic Item export for translation** dialog box opens.



The following options may be available, depending on your company's Connector configuration:

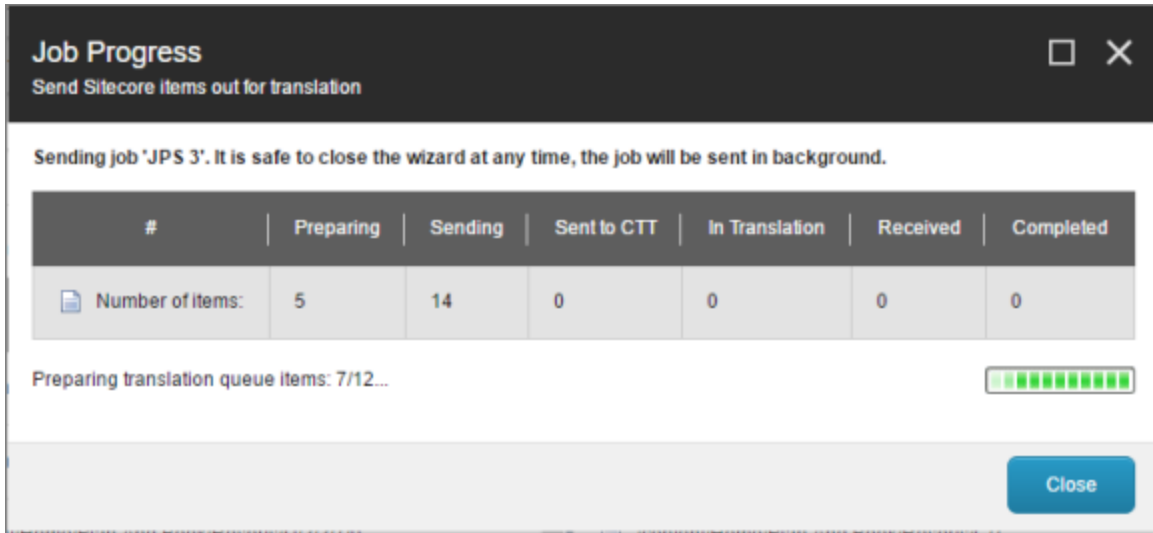
Option	Description
Send Dependent Items	Select this check box to include items from the layout and final layout that are dependent on the selected content item. This is useful, for example, if a page item has multiple layers with different data sources, and you want to translate all the items displayed in the page. The number in parentheses indicates the number of dependent items.

Option	Description
To Language	<p>Select the check boxes for the target languages into which you want to translate the content. If you want to translate the content into all available target languages, select the <b>Select All</b> check box.</p> <p><b>Tip:</b> When you select a target language, if an error states that the language code is misconfigured, it means that you do not have read access to that language. You require read access to a language to send out content for translation to that language.</p> <p><b>Note:</b> Depending on your company's Connector configuration, some languages may already be selected. If so, you can clear any selected languages that you do not want to include.</p>
Use Local TM	<p>Determines whether to check each field of the source version for any content changes, and send <i>only</i> changed content fields out for translation. If a field was previously translated and it has not changed, then the Connector does not send it for translation again: Instead, it uses the stored translation.</p> <ul style="list-style-type: none"> <li>■ When this check box is selected, the Connector sends <i>only</i> changed content fields out for translation. This may reduce translation costs, but it increases the processing time before the Connector sends out the items for translation.</li> <li>■ When this check box is cleared, the Connector sends all specified source content for translation, even if it has not changed since it was previously sent for translation.</li> </ul> <p><b>Note:</b> If the <b>Use Local TM</b> feature is enabled, the Connector checks each field of the source version for any content changes, and it sends <i>only</i> changed content fields out for translation, to ensure that all target versions reflect these changes. This option may also not be available based your company's Connector configuration. For details, refer to the description of the <b>Use Local TM</b> setting in the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
SEO Fields	<p>Select the check boxes for the types of content to send out for translation.</p> <ul style="list-style-type: none"> <li>■ <b>Send SEO fields:</b> The Connector sends fields defined in the <b>SEO Fields</b> section of the <b>Clay Tablet Settings</b> items for translation. Cleared by default.</li> <li>■ <b>Send standard fields:</b> The Connector sends the fields specified by the <b>Field Types to be Sent For Translation</b> parameter in the CT3 <i>Sample Workflow</i>. Selected by default.</li> </ul> <p>For more information, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
Select one of the following <b>Send To Options</b> :	
Send items to translation queue	The Connector sends the content item to the Translation Queue, where a user must approve it to send it out for translation.

Option	Description
Send items to translation provider	<p>The Connector sends the content item to the Clay Tablet Platform, which sends it to the translation provider specified in the company's routing rules. The Connector displays additional fields below, where you can specify additional information.</p> <p><b>Recommendation:</b> Select this option if you need to quickly send out content and do not need to arrange or filter it, for example, by language.</p> <ul style="list-style-type: none"> <li>■ <b>Send To:</b> If your company has multiple translation providers, and if your company's Connector configuration enables selecting the translation provider (instead of using automatic routing rules), you can select the provider for this item in the dropdown list.</li> <li>■ <b>Job Name:</b> Your name for this translation job.</li> <li>■ <b>Delivery Date:</b> The requested translation deadline. This is the date when you expect the translated content to return. By default, it is two weeks from the current date. To select a different date, either type the delivery date in the field in MM/DD/YYYY format, or click the arrow and select a different date in the calendar that opens. This information is sent to the translation provider as metadata of the translation package. <p><b>Note:</b> The default displayed date is based on your company's Connector configuration.</p> <p><b>Recommendation:</b> Discuss with your translation provider whether to use the information in this field.</p> </li> <li>■ <b>PO Reference:</b> The purchase order reference number.</li> <li>■ <b>Special Instruction:</b> Any additional instructions for Lionbridge Freeway. Displayed only if Lionbridge Freeway is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Analysis Code:</b> The analysis codes for the translation. Displayed only if Lionbridge Freeway is selected in the <b>Send to</b> box, above. You specify the analysis codes that are relevant to your content. <p>Your Lionbridge setup determines which analysis codes are available for you to specify, and the values available for selection for each analysis code. In this example, the <i>Region</i>, <i>Department</i>, and <i>Priority</i> analysis codes are available for you to specify.</p> </li> <li>■ <b>Description:</b> A description of the translation job, including any special instructions or requests. Displayed only if a translation provider <i>other than Freeway</i> is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Send for Quote:</b> Select this check box to inform the translation provider that you want to receive a quote before the translation process starts. Displayed only if supported for the selected translation provider and enabled in your Connector installation.</li> </ul>
Copy source to target only	<p>The Connector copies the source content to the target content item without sending it out for translation. This is useful when there is content that you do not want to translate, but that you want to include in the target version. The Connector displays an additional field below, where you specify the job name.</p> <ul style="list-style-type: none"> <li>■ <b>Job Name:</b> Your name for this job.</li> </ul>

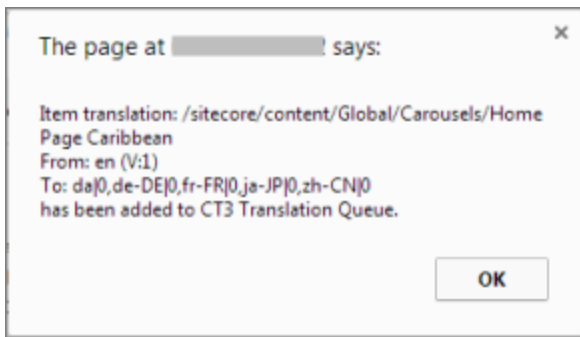
4. Click **OK** to close the dialog box and send the content item to the next step, as described above.

- If you sent the content item to a translation provider, or copied the source content to the target, the **Job Progress** box opens, indicating the Connector's progress in sending out the item for translation or copying over the content. Each target language represents an item. Click **Close** at any time to close the Job Progress box. The processing and sending continues in the background.



- If you sent the content items to the Translation Queue, a message box opens, indicating that the Connector sent the content and the source and target languages. Click **OK** to close the message box.

**Important:** If the Connector sent the item to the Translation Queue, you must approve it there to send it out for translation. For detailed instructions, see ["Submitting Content for Translation from the Translation Queue"](#) on page 62.



**Note:** The Connector never sends out shared fields for translation, because these fields are shared across all versions and languages of an item.

For information about the events that occur when the Connector sends out content for translation, see ["Sending Content to Translation"](#) on page 34.

## 4.4 Sending Multiple Content Items for Translation

The Bulk Translation feature enables you to select, send, and receive large quantities of content for translation in only a few clicks.

This is useful for quickly sending out entire sections, sites, or content trees for translation.

You access the Bulk Translation feature from either the CTC Translation tab on the Sitecore Content Editor ribbon, or from the Start menu on the Sitecore Desktop (Sitecore 6 and 7 only).

**Important:** When you use the Bulk Translation tool, you can initially select a large set of content items, based on the content navigation tree, and then in subsequent steps you exclude items from that group that you do not want to send out for translation.

### Bulk translation and workflow

Recall that you do not need to attach a translation workflow to the content items when you use the bulk translation feature. However, the **Assign Translation Workflow to items with no workflow defined?** option in the wizard enables you to attach a workflow to the items you send out, and you can set the workflow state for those items. This is recommended because it helps manage those items later, especially in the workbox.

**Recommendation:** Plot out your requirements before starting the Bulk Translation wizard, because this feature has powerful implications. Consider the following issues:

- Does every item already have a workflow attached?
- If every item does not already have a workflow attached, do you want to attach the translation workflow to those items?
- If you want to attach the translation workflow to items previously without a workflow, which workflow state do you want to assign to those items?
- What are the repercussions of attaching the workflow and assigning the workflow state to these items?

### To send content for translation using the Bulk Translation feature:

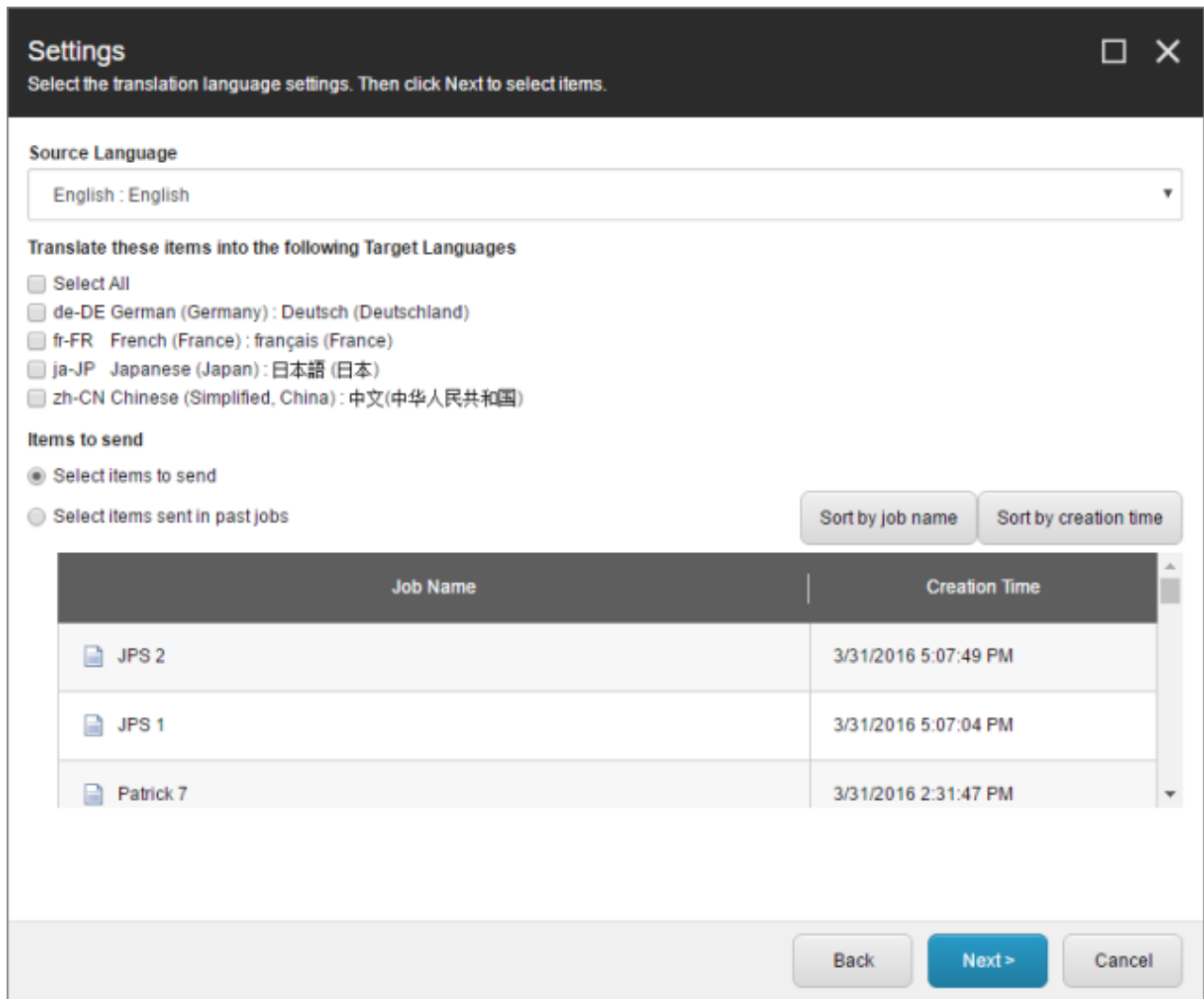
1. Do one of the following to open the Bulk Translation wizard:

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



- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Bulk Translation** from the menu. (Sitecore 6 and 7 only)

The **Settings** page of the wizard opens.



2. In the **Settings** page, you choose the following settings:

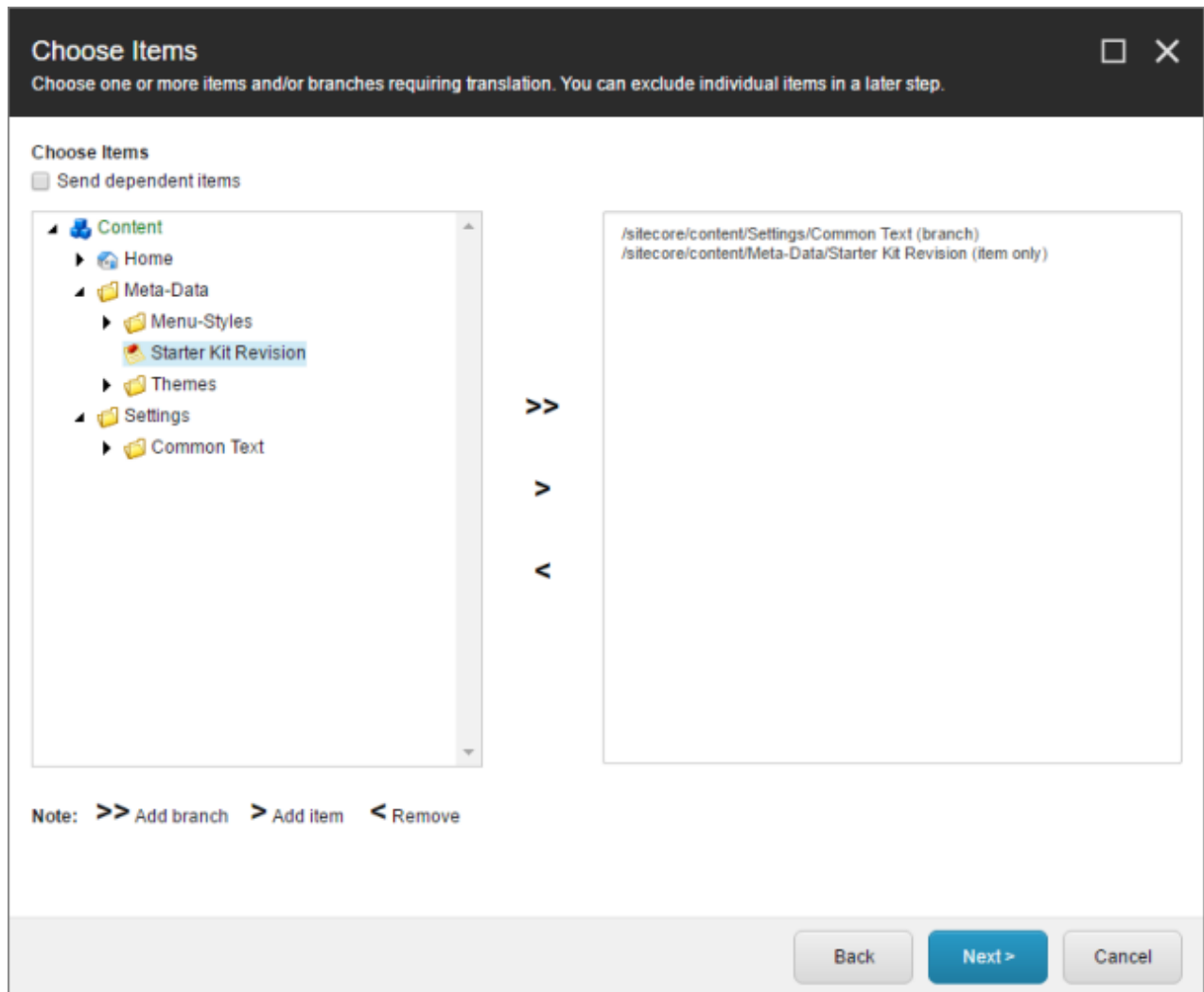
Setting	Description
Source Language	The Connector will send items in this source language for translation. By default this is the default Sitecore language. You can select another language from the list.

Setting	Description
Translate these items into the following Target Languages	<p>Select the check boxes for all the target languages into which you want to translate the source content. The list displays all the Sitecore languages that are set up for the Connector.</p> <p><b>Tip:</b> Use the <b>Select All</b> button (Sitecore 6 and 7) or check box (Sitecore 8) to select all available languages.</p> <p><b>Tip:</b> When you select a target language, if an error states that the language code is misconfigured, it means that you do not have read access to that language. You require read access to a language to send out content for translation to that language.</p> <p><b>Note:</b> In a later step of this wizard, you can select individual content items from the list of content items and modify their target languages. This is useful for any specific exceptions that may require special target language treatment.</p>
Items to send	<p>This section displays the names of items you can send for translation and the date and time they were created. By default, these items are sorted in order of reverse chronological creation date.</p> <ul style="list-style-type: none"> <li>■ To sort these items by name, click <b>Sort by job name</b>.</li> <li>■ To sort these items by date, click <b>Sort by creation date</b>.</li> </ul> <p>You can choose one of the following settings:</p> <ul style="list-style-type: none"> <li>■ <b>Select items to send:</b> This displays all items in the specified source language.</li> <li>■ <b>Select items sent in past jobs:</b> This displays all items in the specified source language that were previously sent for translation.</li> </ul> <p><b>Note:</b> Later in the wizard you can exclude items from this list.</p>

When you are done, click **Next**.

- If in the previous step you selected **Select items to send**, then the **Choose Items** page of the wizard opens. Proceed to the next step.
  - If in the previous step you selected **Select items sent in past jobs**, then the **Translation Options** page of the wizard opens. Proceed to step 8.
3. In the **Choose Items** page, you select the source items to send for translation. You can select individual items or all the items in a branch. In later steps, you can exclude items so that you do not send them for translation. If you send content to the Translation Queue, you can further sort and select the items there to send for translation.





Use the Expand and Collapse icons to navigate the tree, and then use the following buttons to collect the items and branches of items for translation in the right pane of this page:

Use the following buttons to specify which items to collect for translation:

- To add a branch to the right pane, select it and click . It is displayed in the right pane following by (branch).
- To add an item to the right pane, select it and click . It is displayed in the right pane following by (item).
- To remove one or more items from the right pane, select them and click .

**Tip:** If you specify the highest root in your Sitecore project and click , *all* content from a site or Content Server, you can send all your project content for translation at one time.

Optional. To include items from the layout and final layout that are dependent on the selected content items, select the **Send dependent items** check box at the top of the page. This is useful, for example, if a page

item has multiple layers with different data sources, and you want to translate all the items displayed in the page.

**Notes:** Your company can configure which dependent items the Connector sends for translation when this check box is selected. It can also configure the default value of this check box. For detailed instructions, refer to the *ClayTablet Connector for Sitecore Installation and Configuration Guide*.

When you are done, click **Next**.

The **Specify Source Filters** page of the wizard opens.

4. In the **Specify Source Filters** page, you specify the filters to apply to the source content, which limits the content that you send for translation. It enables you to apply very specific conditions and precisely control which content you send out for translation. For example, using the filters on this page, you can select all the items created by a certain user, during a given date range, and then send only the latest version of those items.

**Important:** These filters are inclusive parameters. Only items that match all filter parameters will be available for further selection on subsequent pages of the wizard.

**Specify Source Filters** □ ✕

Specify the filters that you want to apply to the source. Click Next to continue.

Item version filter

Send only the Latest Version

Creation date filter

From    Clear Filter

To

Modification date filter

From    Clear Filter

To

Publish date filter

Publish Date    Clear Filter

Take workflow into account

Created by filter

Back Next > Cancel

You can use the following filters:

Filter	Description
Item version filter	<p>You filter the version or versions of the content items that the Connector sends out for translation. The following options are available:</p> <ul style="list-style-type: none"> <li>■ <b>Send only the latest version:</b> The Connector sends only the latest version of content for translation. This is the default selection.</li> <li>■ <b>Send the latest published version:</b> The Connector sends only the latest published version of content for translation. This is suitable when a company publishes content before sending it for translation.</li> <li>■ <b>Send all published versions:</b> The Connector sends all published versions of content for translation.</li> <li>■ <b>Send all versions:</b> The Connector sends all versions of content for translation.</li> </ul> <p><b>Note:</b> If you select one of the last two options, the Connector sends multiple versions of the same content items for translation.</p>
Creation date filter	<p>You filter the creation date of the content items that the Connector sends out for translation. In the <b>From</b> and <b>To</b> fields, either enter the range of content-creation dates in MM/DD/YYYY format, or click the arrow and select a date from the calendar that opens.</p>
Modification date filter	<p>You filter the modification date of the content items that the Connector sends out for translation. In the <b>From</b> and <b>To</b> fields, either enter the range of content-modification dates in MM/DD/YYYY format, or click the arrow and select a date from the calendar that opens.</p>
Publish date filter – Publish Date	<p>You filter the publication date of the content items that the Connector sends out for translation. In the <b>Publish Date</b> field, either enter the content-publication date in MM/DD/YYYY format, or click the arrow and select a date from the calendar that opens.</p>
Publish date filter – Take workflow into account	<p>This setting determines whether the Connector checks the Publish date filter.</p> <ul style="list-style-type: none"> <li>■ If this check box is selected (default value), then the Connector includes in the filter only items that both match the publish date <i>and</i> those that need publishing to be approved through the workflow.</li> <li>■ If this check box is cleared, then the Connector includes in the filter items that match the publish date whether or not publishing must be approved through the workflow.</li> </ul>
Created by filter	<p>You create a filter based on who created the content item. This can be either users, or roles assigned to users, or both.</p> <ul style="list-style-type: none"> <li>■ To add a filter to this list, click <b>Add</b>. For detailed instructions, see page <a href="#">61</a>.</li> <li>■ To remove a filter from this list, select it and click <b>Remove</b>.</li> </ul>

Filter	Description
Updated by filter	<p>You create a filter based on who updated the content item in Sitecore. This can be either users, or roles assigned to users, or both.</p> <ul style="list-style-type: none"> <li>■ To add a filter to this list, click <b>Add</b>. For detailed instructions, see page <a href="#">61</a>.</li> <li>■ To remove a filter from this list, select it and click <b>Remove</b>.</li> </ul>

**Tip:** To clear the information from any filter, click the corresponding **Clear Filter** button.

When you are done, click **Next**.

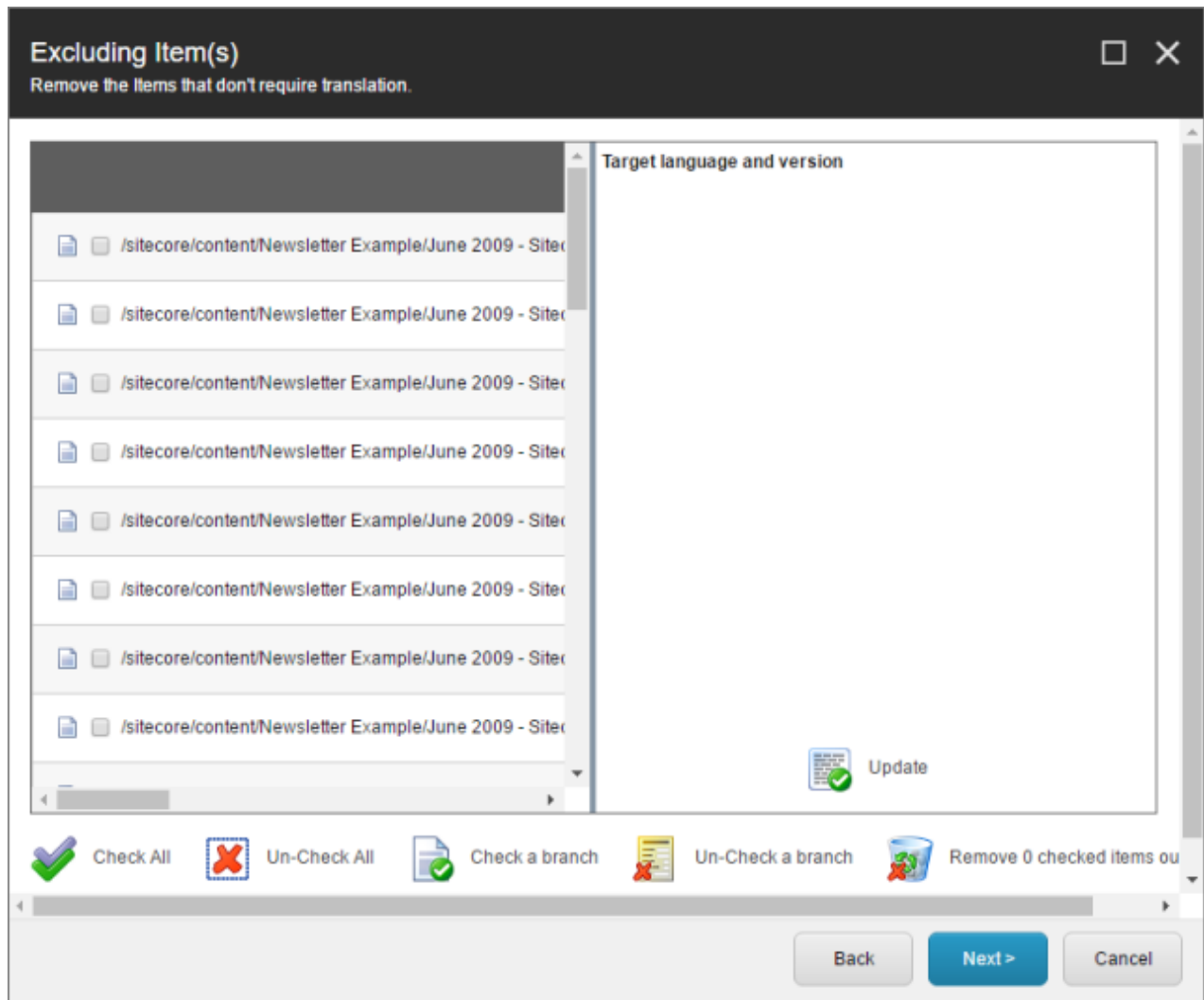
The **Excluding Item(s)** page of the wizard opens.

- In the **Excluding Item(s)** page of the wizard, you can precisely control the translation parameters for each content item you sent for translation. This helps you manage any exceptional translation requirements. You can:

- Remove content items from the list, so that you do not send them out for translation.

**Note:** If you selected the **Send dependent items** check box at the bottom of the **Choose Items** page, in step 4, above, then if you exclude some items from the list, their dependent items will automatically be excluded.

- Change the target language of each item to send out for translation. For example, you may select a section of your web site to be bulk exported for translation into German, but you want to translate the top-level page items of that section into Spanish and French too.
- Change the version of each item to send out for translation for each target language. For example, you may want an older version of the source content translated into a specific target language.




- To remove one or content items from the list, so that you do not send the out for translation, select the corresponding check boxes in the left page, and click **Remove X checked items out of Y** at the bottom of the list, where X is the number of items that are already selected for removal, and Y is the total number of items displayed in the list.

**Tips:** Use the `Shift` key to select a range of adjacent roles or users. Use the `Ctrl` key to select multiple non-adjacent roles or users.

**Tips:** To select all content items in the list, click **Check All**. To clear the check boxes for all selected content items in the list, click **Un-Check All**.

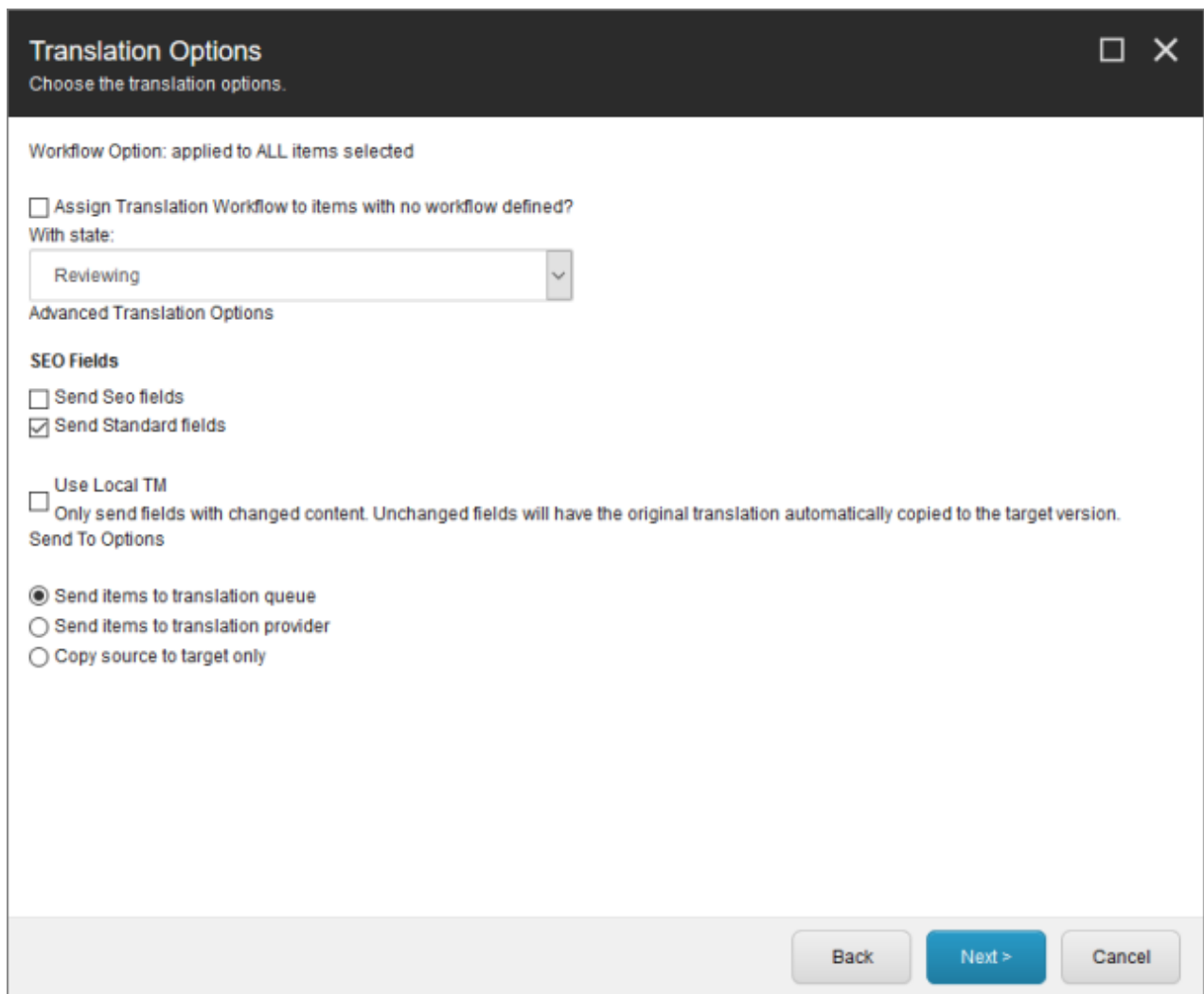
**Tips about working with branches:** To select all the content items in a branch, select one item in that branch and then click **Check a branch**. To clear the check boxes for all selected content items in a branch, click **Un-Check a branch**.

- To change the target languages and versions to translate, click a content item in the left pane to highlight it, as shown in the above screen capture. The right pane now displays the target languages set up for the Connector. Any target languages that you selected earlier, in the Settings page of the wizard, are selected. You can change this default selection by selecting the check boxes for additional target languages or clearing the check boxes for selected target languages.
- To change the version assigned to the content item, change the version number in the **Version** box for the language. If you select *Default*, the version number is incremented by one.

To save your changes to a target language and version for a content item, click  **Update** at the bottom of the right pane.

6. When you are done, click **Next**.

The **Translation Options** page of the wizard opens.



**Translation Options**  
Choose the translation options.

Workflow Option: applied to ALL items selected

Assign Translation Workflow to items with no workflow defined?  
With state:  
Reviewing

Advanced Translation Options

**SEO Fields**

Send Seo fields  
 Send Standard fields

Use Local TM  
Only send fields with changed content. Unchanged fields will have the original translation automatically copied to the target version.

Send To Options

Send items to translation queue  
 Send items to translation provider  
 Copy source to target only

Back Next > Cancel

7. In the **Translation Options** page of the wizard, you can assign a workflow to items without a workflow, set the workflow state for the content items you are sending to translation, send only changed content fields for translation, and decide whether to immediately send the content item out for translation, send it to the Translation Queue first, or copy the source content to the target version without translating it. You can set the following options:

Option	Description
Assign Translation Workflow to items with no workflow defined?	<p>You can attach a translation workflow to the content items you send out for translation, and you can set the workflow state for those items. This is recommended because it helps manage those items later, especially in the workbox.</p> <p><b>Tip:</b> If you initially send out your entire site for translation before setting up workflow, <i>do not</i> set the bulk items to an initial workflow state.</p> <p><b>Note:</b> Depending on your company's configuration, you may not be able to send out content items for translation unless they are attached to a translation workflow. You can change this configuration with the <code>ClayTablet.PreventSendingItemsWithoutWorkflow</code> setting in the <code>CT3Translation.config</code> file. For details, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p> <p><b>Note:</b> By default, the translation workflow is the <code>CT3 Sample Workflow</code>. You can set the default workflow state using the <code>ClayTablet.StateToAssignInBulkTranslation</code> setting in the <code>CT3Translation.config</code> file. For details, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p> <ul style="list-style-type: none"> <li>■ To assign the translation workflow to any content items without a workflow assigned, select this check box.</li> <li>■ To proceed with the translation process without assigning a translation workflow to content items without a workflow, clear this check box.</li> </ul> <p><b>With state:</b> If you select this check box, you select the workflow state to apply to all source content items that previously did not have a translation workflow assigned. For a list and description of workflow states, see page <a href="#">34</a>.</p>

Option	Description
SEO Fields	<p>Select the check boxes for the types of content to send out for translation.</p> <ul style="list-style-type: none"> <li>■ <b>Send SEO fields:</b> The Connector sends fields defined in the <b>SEO Fields</b> section of the <b>Clay Tablet Settings</b> items for translation. Cleared by default.</li> <li>■ <b>Send standard fields:</b> The Connector sends the fields specified by the <b>Field Types to be Sent For Translation</b> parameter in the <i>CT3 Sample Workflow</i>. Selected by default.</li> </ul> <p>For more information, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
Use Local TM: Only send fields with changed content. Unchanged fields will have the original translation automatically copied to the target version.	<p>Determines whether to check each field of the source version for any content changes, and send <i>only</i> changed content fields out for translation. If a field was previously translated and it has not changed, then the Connector does not send it for translation again: Instead, it uses the stored translation.</p> <ul style="list-style-type: none"> <li>■ When this check box is selected, the Connector sends <i>only</i> changed content fields out for translation. This may reduce translation costs, but it increases the processing time before the Connector sends out the items for translation.</li> <li>■ When this check box is cleared, the Connector sends all specified source content for translation, even if it has not changed since it was previously sent for translation.</li> </ul> <p><b>Note:</b> If the <b>Use Local TM</b> feature is enabled, the Connector checks each field of the source version for any content changes, and it sends <i>only</i> changed content fields out for translation, to ensure that all target versions reflect these changes. This option may also not be available based your company's Connector configuration. For details, refer to the description of the <b>Use Local TM</b> setting in the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p> <p><b>Note:</b> This option may not be available, based your company's Connector configuration. For details, refer to the <i>Clay Tablet Connector for Sitecore Installation and Configuration Guide</i>.</p>
Select one of the following <b>Send To Options</b> :	



Option	Description
Send items to translation queue	<p>The Connector sends the content items to the Translation Queue, where a user must approve them to send them out for translation.</p> <p><b>Recommendation:</b> Select this option if you want to use the Translation Queue to batch together many items for translation into many target languages, but then <i>only</i> immediately send out those items for translation into a single language.</p>

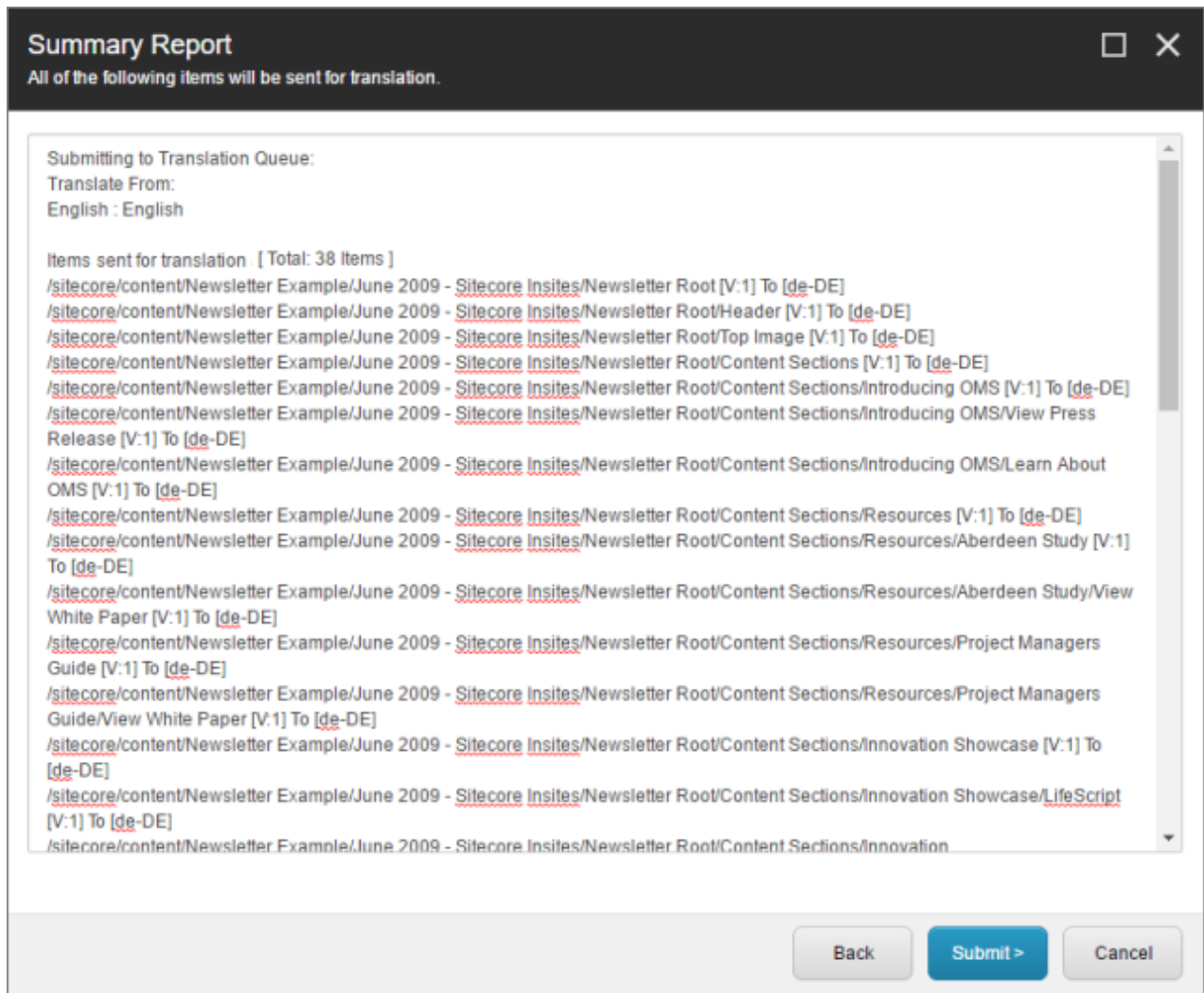
Option	Description
Send items to translation provider	<p>The Connector sends the content items to the Clay Tablet Platform, which sends it to the translation provider specified in the company's routing rules. The Connector displays additional fields below, where you can specify additional information.</p> <p><b>Recommendation:</b> Select this option if you need to quickly send out content and do not need to arrange or filter it, for example, by language.</p> <ul style="list-style-type: none"> <li>■ <b>Send To:</b> If your company has multiple translation providers, and if your company's Connector configuration enables selecting the translation provider (instead of using automatic routing rules), you can select the provider for this item in the dropdown list.</li> <li>■ <b>Job Name:</b> Your name for this translation job.</li> <li>■ <b>Delivery Date:</b> The requested translation deadline. This is the date when you expect the translated content to return. By default, it is two weeks from the current date. To select a different date, either type the delivery date in the field in MM/DD/YYYY format, or click the arrow and select a different date in the calendar that opens. This information is sent to the translation provider as metadata of the translation package.</li> </ul> <p><b>Note:</b> The default displayed date is based on your company's Connector configuration.</p> <p><b>Recommendation:</b> Discuss with your translation provider whether to use the information in this field.</p> <ul style="list-style-type: none"> <li>■ <b>PO Reference:</b> The purchase order reference number.</li> <li>■ <b>Special Instruction:</b> Any additional instructions for Lionbridge Freeway. Displayed only if <code>Lionbridge Freeway</code> is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Analysis Code:</b> The analysis codes for the translation. Displayed only if <code>Lionbridge Freeway</code> is selected in the <b>Send to</b> box, above. You specify the analysis codes that are relevant to your content.</li> </ul> <p>Your Lionbridge setup determines which analysis codes are available for you to specify, and the values available for selection for each analysis code. In this example, the <code>Region</code>, <code>Department</code>, and <code>Priority</code> analysis codes are available for you to specify.</p> <ul style="list-style-type: none"> <li>■ <b>Description:</b> A description of the translation job, including any special instructions or requests. Displayed only if a translation provider <i>other than Freeway</i> is selected in the <b>Send to</b> box, above.</li> <li>■ <b>Send for Quote:</b> Select this check box to inform the translation provider that you want to receive a quote before the translation process starts. Displayed only if supported for the selected translation provider and enabled in your Connector installation.</li> </ul>

Option	Description
Copy source to target only	The Connector copies the source content to the target content item without sending it out for translation. This is useful when there is content that you do not want to translate, but that you want to include in the target version. The Connector displays an additional field below, where you specify the job name. <ul style="list-style-type: none"> <li>■ <b>Job Name:</b> Your name for this job.</li> </ul>

When you are done, click **Next**.

The **Summary Report** page of the wizard opens.

- Use the **Summary Report** page to review the content items you are sending for translation as well as the target languages, if applicable.



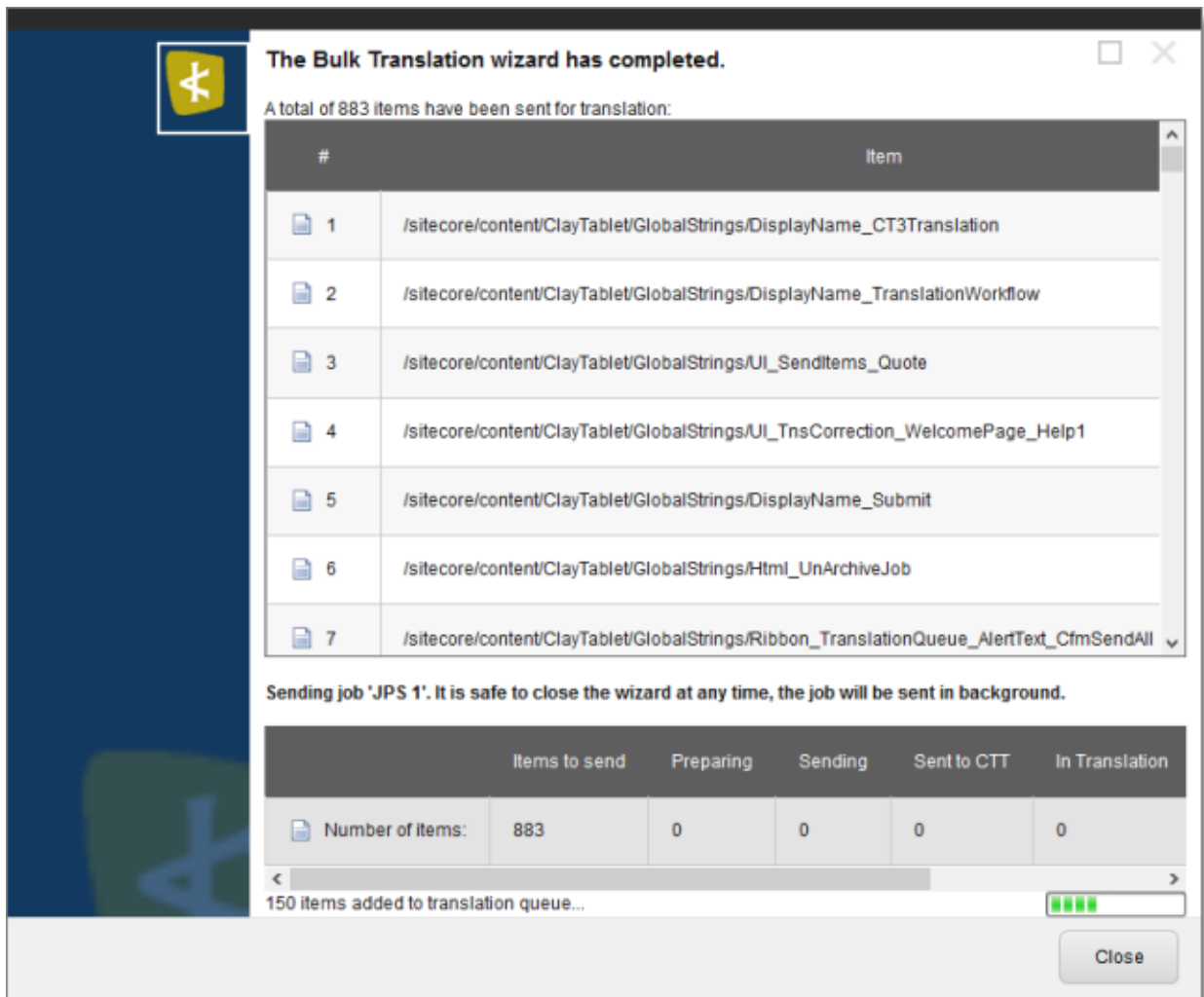
Click **Submit** to send the content items to the next step, which you specified earlier in the Translation Options page of the wizard.

The final page of the wizard opens, displaying the following information:

- The number of content items sent out for translation, to the Translation Queue, or copied over to the target version without translation.
- Whether the items were sent out for translation, to the Translation Queue, or copied over to the target version without translation.

**Important:** If the Connector sent the items to the Translation Queue, you must approve them there to send them out for translation. For detailed instructions, see ["Submitting Content for Translation from the Translation Queue"](#) on page 62.

- A list of all content items, including their paths, that the Connector sent out for translation, to the Translation Queue or copied over to the target version without translation.



If you sent the content items to a translation provider, or copied the source content to the target, the Job Progress box is displayed at the bottom of the page, indicating the Connector's progress in sending out the items for translation or copying over the content. The **Number of Items** refers to the number of content items in the source language. In the other columns, each target language represents an item.

9. Close the wizard:

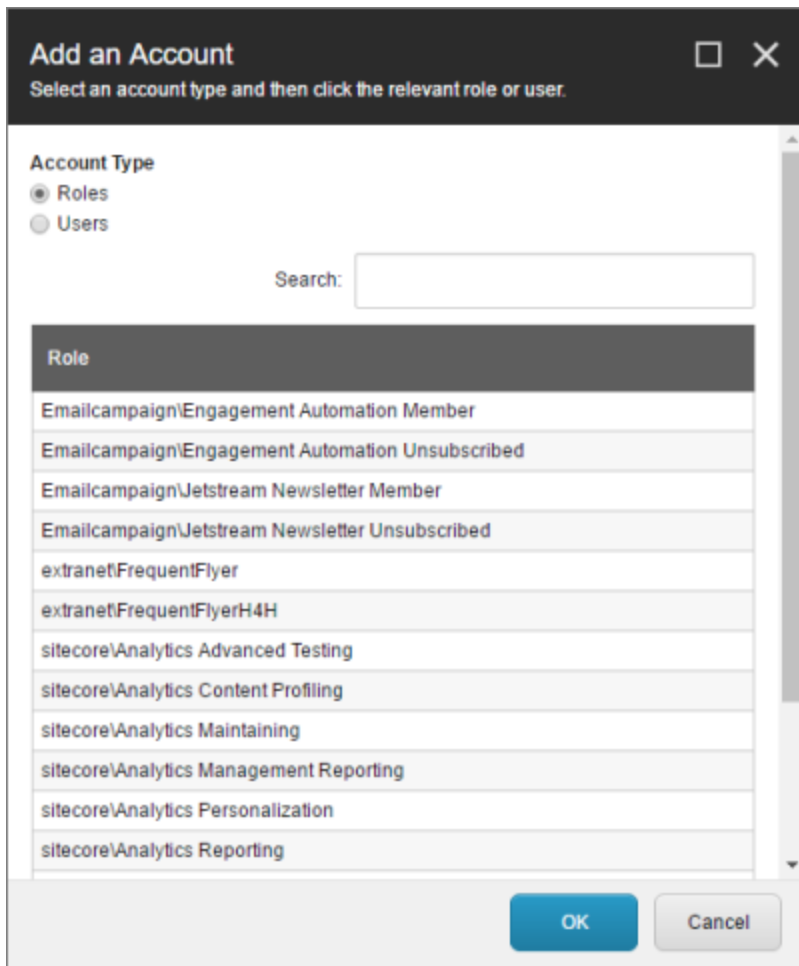
- In Sitecore 6 and 7, click **Finish**.
- In Sitecore 8, click **Close**.

The processing and sending continues in the background.

#### 4.4.1 Adding a Source Filter when Sending Multiple Items for Translation

The **Add an Account** dialog box (Sitecore 8) or the **Select an Account** dialog box (Sitecore 6 and 7) opens when you click the **Add** button in the **Created by filter** section or the **Updated by filter** section in the **Specify Source Filters** page of the **Bulk Translation** wizard.

You use this dialog box to create a filter for sending bulk content for translation based on roles or individual users who created or updated the content items.



By default, this window displays all roles. By default, the items in the list are displayed in alphabetical order.

- ▶ To display users instead of roles, click **Users** in the **Account Type** box at the top of the window.

Roles are displayed in alphabetical order.

If users are displayed, they are displayed in alphabetical order.

You select the roles for the filter. For example, if you are creating a filter to include only content created by users assigned to certain roles, you select these roles.

**Tips:** Use the `Shift` key to select a range of adjacent roles or users. Use the `Ctrl` key to select multiple non-adjacent roles or users.

For information about navigating the pages in the list, see "[Navigating Pages in a List](#)" on page 16.

When you are done, click **OK**.

## 4.5 Submitting Content for Translation from the Translation Queue

You submit content for translation from the Translation Queue in the following scenarios:

- When you reviewed content, you submitted it to the Translation Queue, by selecting the **Send items to translation queue** radio button, instead of immediately sending it for translation, as described in the previous sections:

- "Submitting a Content Item for Translation using the Content Editor" on page 35
- "Submitting Content for Translation from the Page Editor or the Experience Editor" on page 41
- "Sending Multiple Content Items for Translation" on page 46

- Your company is configured to always submit content items to the Translation Queue before sending them out for translation.

Submitting content to the Translation Queue before sending it out for translation has the following advantages:

- You may not want to send out each content item individually as soon as you finish reviewing it. The Translation Queue facilitates your management of reviewed content, so that you do not forget about sending individual reviewed content items for translation.
- Your translation provider may prefer receiving fewer but larger batches of content to translate, rather than individual content items, as this facilitates project preparation, resource assignment, and file analysis.
- If you want to translate many items into multiple languages, but you want to translate into only one target language at a time, this is a good way to manage that process.

If you or your colleagues have added content items to the Translation Queue, you must access it and approve the files you want to send out.

**Note:** If you do not approve content items in the Translation Queue, the Connector does not send them out for translation.

When you send content for translation from the Translation Queue, you can add job metadata, including a job name and a requested delivery date, when the translations will be returned.

**Note:** These instructions assume you already have content items in the Translation Queue. For information on submitting content to the Translation Queue, see "Submitting a Content Item for Translation using the Content Editor" on page 35.

### To submit one or more content items from the Translation Queue for translation:

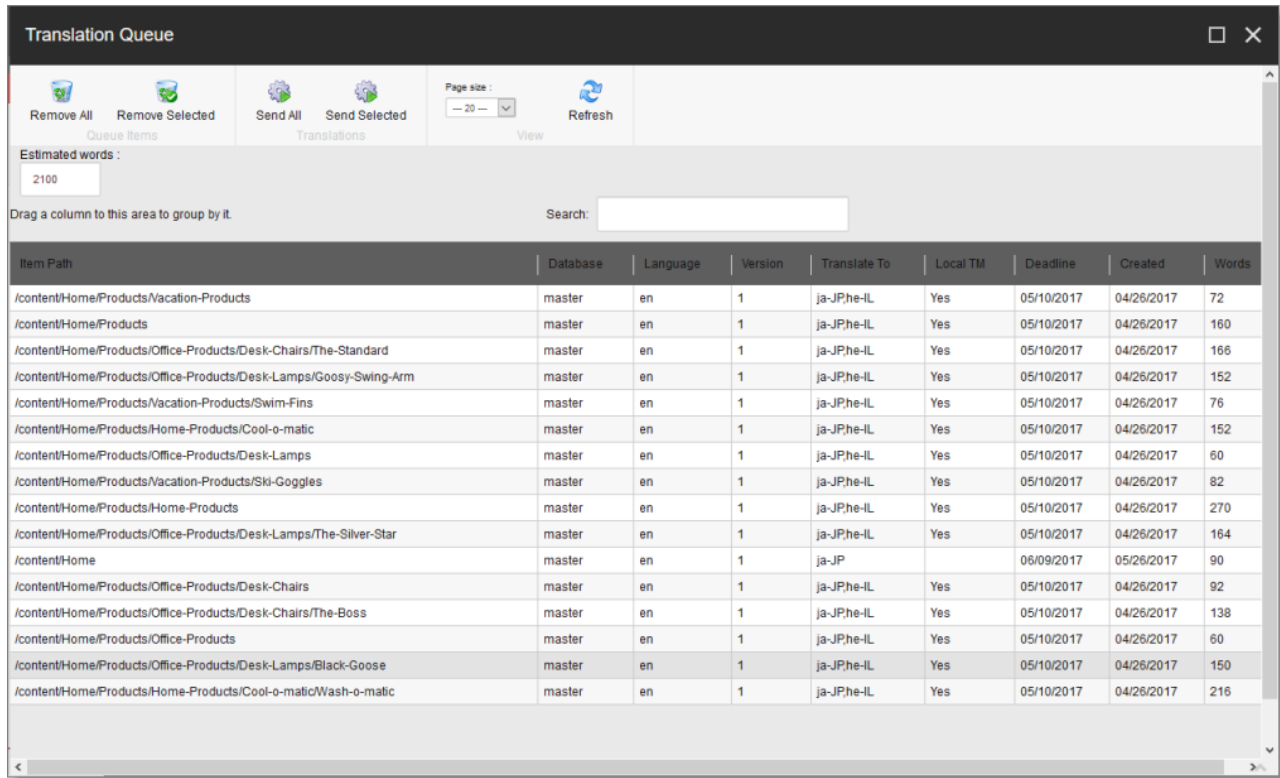
1. Do one of the following to open the Translation Queue:

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



- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Queue** from the menu. (Sitecore 6 and 7 only)

The **Translation Queue** opens.



The top of the window displays the total number of estimated words in all the content items in the queue.

The window displays all the content items in the queue that you submitted.

**Note:** You can group the content items by column. For detailed instructions, see "[Grouping Content Items by Column](#)" on page 19.

**Note:** If you are assigned to the `sitecore\Translation Administrator` role, the **Show queue items from all users** check box is displayed. To view *all* items in the queue, select this check box.

The window displays the following information about the content items in the queue:

Column	Description
Item Path	The path and name of the content item.
Database	The database that stores this content item.
Language	The language code of the source language of the content item to send for translation.
Version	The version of the content item to send for translation.
Translate To	The language codes of the target languages into which to translate the content item.



Column	Description
Local TM	Indicates whether the Use Local TM feature is enabled for this content item. This feature sends only changed content fields out for translation, which reduces translation costs. <ul style="list-style-type: none"> <li>■ If this column has a value of <code>Yes</code>, then this feature is enabled for this content item.</li> <li>■ If this column is blank, then this feature is not enabled for this content item.</li> </ul>
Deadline	The requested date for received the translated content back from the translation provider, in MM/DD/YYYY format.
Created	The date when the source content item was created, in MM/DD/YYYY format.
Words	The number of words in the content item.
User	The user who submitted this content item to the queue. Displayed only if you are assigned to the <code>sitecore\Translation Administrator</code> role, and if you selected the <b>Show queue items from all users</b> check box, described above.

**Note:** To change the number of items displayed on a page in the queue, select a number from the **Page size** dropdown list. By default, 20 items are displayed on a page.

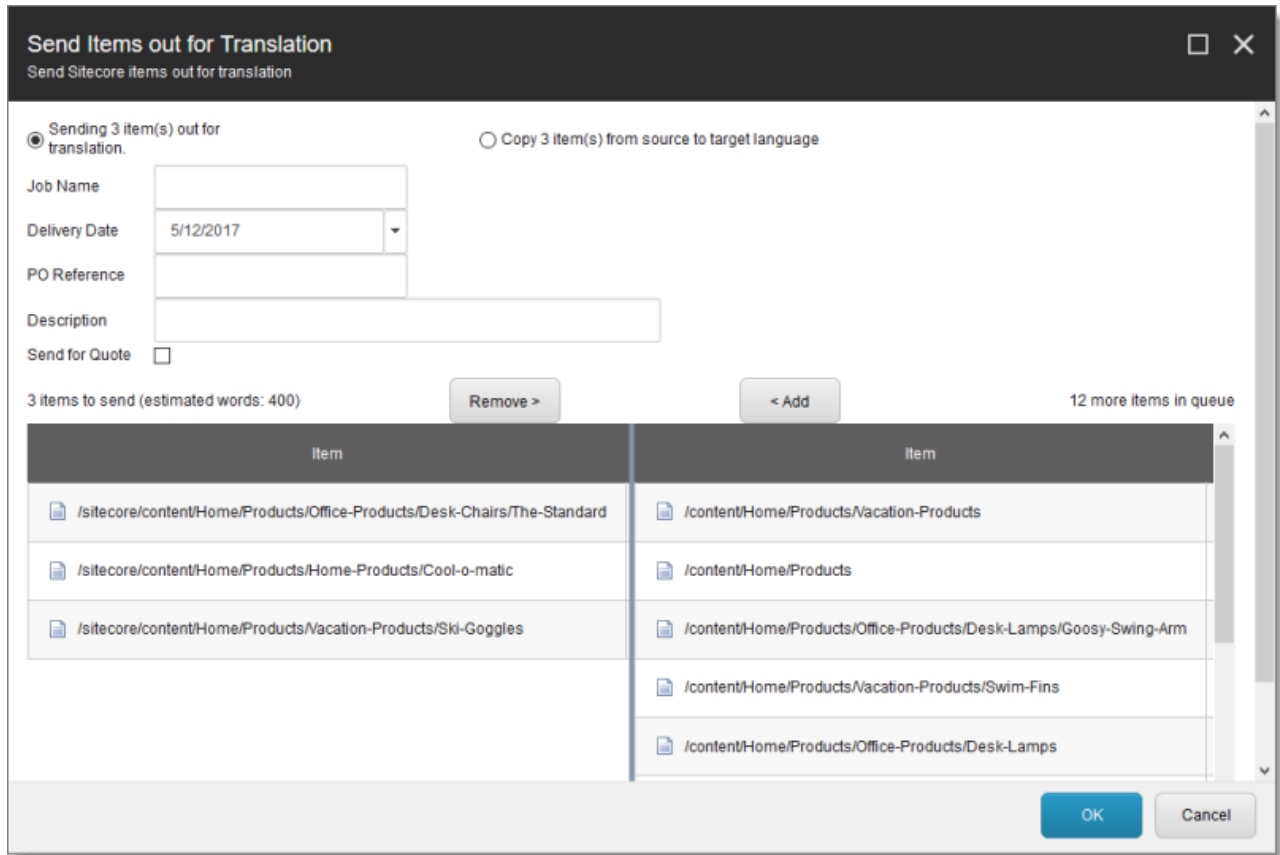
2. Do one of the following:

- Select one or more content items to send for translation, and click **Send Selected**.

**Tips:** Use the `Shift` key to select a range of adjacent items. Use the `Ctrl` key to select multiple non-adjacent items.

- Click **Send All**.

The **Send Items Out for Translation** dialog box opens.



The items you selected to send are in the **items to send** pane on the left. If you did not select all the items in the queue, then the items you did not select are in the **items in queue** pane on the right.

3. Choose one of the following:

- To send the selected items to your translation provider, select **Sending X items for translation to**, where X is the number of selected items. If your company has multiple translation providers, and if your company's Connector configuration enables selecting the translation provider (instead of using automatic routing rules), you can select the provider for this job in the **Send item(s) to** dropdown list.

Enter the following information about the job in the fields at the top:

Option	Description
Job Name	Your name for this translation job.

Option	Description
Delivery Date	<p>The requested translation deadline. This is the date when you expect the translated content to return. By default, it is two weeks from the current date. To select a different date, either type the delivery date in the field in MM/DD/YYYY format, or click the arrow and select a different date in the calendar that opens.</p> <p>This information is sent to the translation provider as metadata of the translation package.</p> <p><b>Note:</b> The default displayed date is based on your company's Connector configuration.</p> <p><b>Recommendation:</b> Discuss with your translation provider whether to use the information in this field.</p>
PO Reference	The purchase order reference number.
Description	A description of the translation job, including any special instructions or requests. Displayed only if a translation provider <i>other than Freeway</i> is selected in the <b>Send to</b> box, above.
Send for Quote	Select this check box to inform the translation provider that you want to receive a quote before the translation process starts. Displayed only if supported for the selected translation provider and enabled in your Connector installation.
Special Instruction	Any additional instructions for Freeway. Displayed only if <i>Freeway</i> is selected in the <b>Sending items for translation to</b> box, above.
Analysis Code	<p>The analysis codes for the translation. Displayed only if <i>Freeway</i> is selected in the <b>Sending for translation items to</b> box, above. You can specify the following types of analysis codes:</p> <ul style="list-style-type: none"> <li>■ <b>Region:</b> The region relevant to the content. Your Lionbridge setup determines which regions are displayed in the list.</li> <li>■ <b>Department:</b> The department relevant to the content. Your Lionbridge setup determines which departments are displayed in the list.</li> <li>■ <b>Priority:</b> The priority relevant to the content. Your Lionbridge setup determines which priorities are displayed in the list.</li> </ul>

This information is delivered to your translation provider along with the content items for translation.

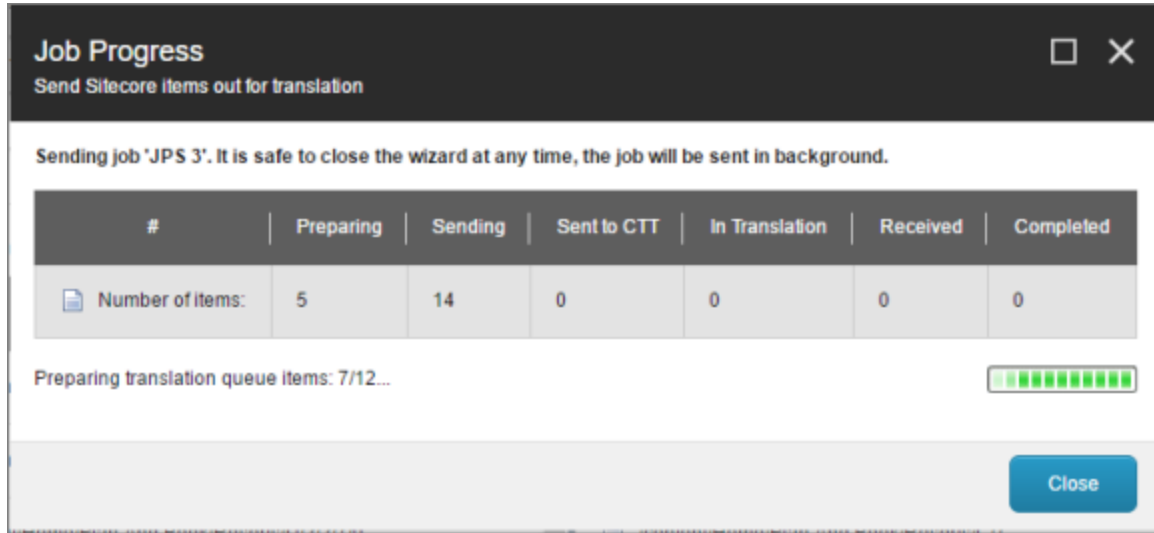
- To copy over the selected items to the target version, without translating them, select **Copy X items from source to target language**, where X is the number of selected items.

4. Optional. To add other items to your job, select them in the **more items in queue** pane on the right and click **Add**.

**Note:** To remove items from your job, select them in the **items to send** pane on the left and click **Remove**.

5. To send the items for translation or copy the source to the target, without translation, click **OK**.

The **Job Progress** box opens, indicating the Connector's progress in sending out the items for translation or copying over the content. Each target language represents an item.



6. Click **Close** at any time to close the Job Progress box. The processing and sending continues in the background.

**Tip:** To monitor the translation progress, In the **Translation Tools** section of the **CTC Translation** tab, click **Translation Status**. For detailed instructions, see "[Monitoring Translation Status](#)" on page 69.

## 5 Monitoring Translation Status

You can track the status of your translation jobs from within the Content Editor, from the **CTC Translation** tab on the ribbon. There are three ways to monitor the translation status:

- View the status summary, as described on page 70.
- View the status of a single item, as described on page 74.
- View the status of all items in your job, as described on page 71.

For a list and description of translation statuses, see "[Translation Statuses](#)" on page 69.

### 5.1 Translation Statuses

Content items have one of the following translation statuses:

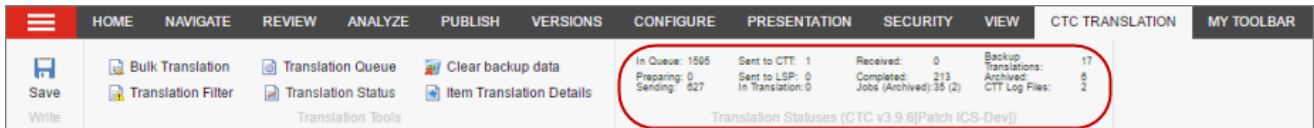
Translation Status	Description	Percentage Translation Complete
Error Only	Displayed only in the <b>Status</b> dropdown list in the <b>Translation Status</b> window. Displays only items with errors in the translation process, including errors that occur when the Connector sends out or receives translations, and errors reported back by the translation connector. <b>Note:</b> Some items may have errors while others are processed normally.	N/A
[In Queue] Wait for approval	The Connector sent the item to the Translation Queue. It must be approved in the queue before the Connector sends it out for translation.	0%
Preparing	The Connector is preparing to send out the item to the translation provider.	1%
Sending	The Connector is preparing to send out the item to the translation provider.	1%
Sent to CTT	The Connector is preparing to send out the item to the translation provider.	2%
Sent to LSP	The Connector completed sending out the item to the translation provider.	5%
In Translation	The translation provider has received the item for translation and has not yet returned the translated item.	10%
Received	The Connector received the translated item back from the translation provider.	90%
Not Yet Completed	Displayed only in the <b>Status</b> dropdown list in the <b>Translation Status</b> window. Displays only items that do not have <b>Completed</b> status, as described below.	0%-90%

Translation Status	Description	Percentage Translation Complete
Completed	The Connector has returned the translated item to Sitecore.	100%
No field to translate	There are no fields to translate in the content item. (The fields may have been excluded by the Translation Filter or the filter in the Bulk Translation wizard.)	100%

## 5.2 Viewing Your Translation Status Summary

You can view a summary of the translation status of all content items in this Sitecore instance.

- To view this summary, on the **Sitecore Content Editor** ribbon, click the **CTC Translation** tab. The summary is displayed on the **Translation Statuses** section of **CTC Translation** tab.



The following information is displayed about your content items:

Information	Description	Percentage Translation Complete
In Queue	The number of content items in the Translation Queue.	0%
Preparing	The number of content items that the Connector is preparing to sent to the Clay Tablet Platform.	1%
Sending	The number of content items that the Connector is currently sending to the Clay Tablet Platform.	n/a
Sent to CTT	The number of content items that the Connector sent to the Clay Tablet Platform, which is currently preparing to send them out for translation.	2%
Sent to LSP	The number of content items that the translation vendor has received to translate.	5%
In Translation	The number of content items that the translation vendor has received to translate.	10%

Information	Description	Percentage Translation Complete
Received	The number of translated content items that the Connector has received back from the translation provider.	90%
Completed	The number of translated content items that the Connector has returned to Sitecore.	100%
Jobs (Archived)	The number of translation jobs that the Connector has sent out for translation. A job includes one or more content items. The number of archived jobs is in brackets.	n/a
Backup Translations	The number of content items for which the translations are backed up.	n/a
Archived	The number of archived content items.	n/a
CTT Log Files	The number of CTT log files that are in the \$(dataFolder)/Logs/ folder.	n/a

## 5.3 Monitoring Status for Multiple Items

You can view the translation status of multiple content items from either the Sitecore Content Editor or the Sitecore Desktop. You can also view error messages from the translation provider (LSP) about items displayed in the window.

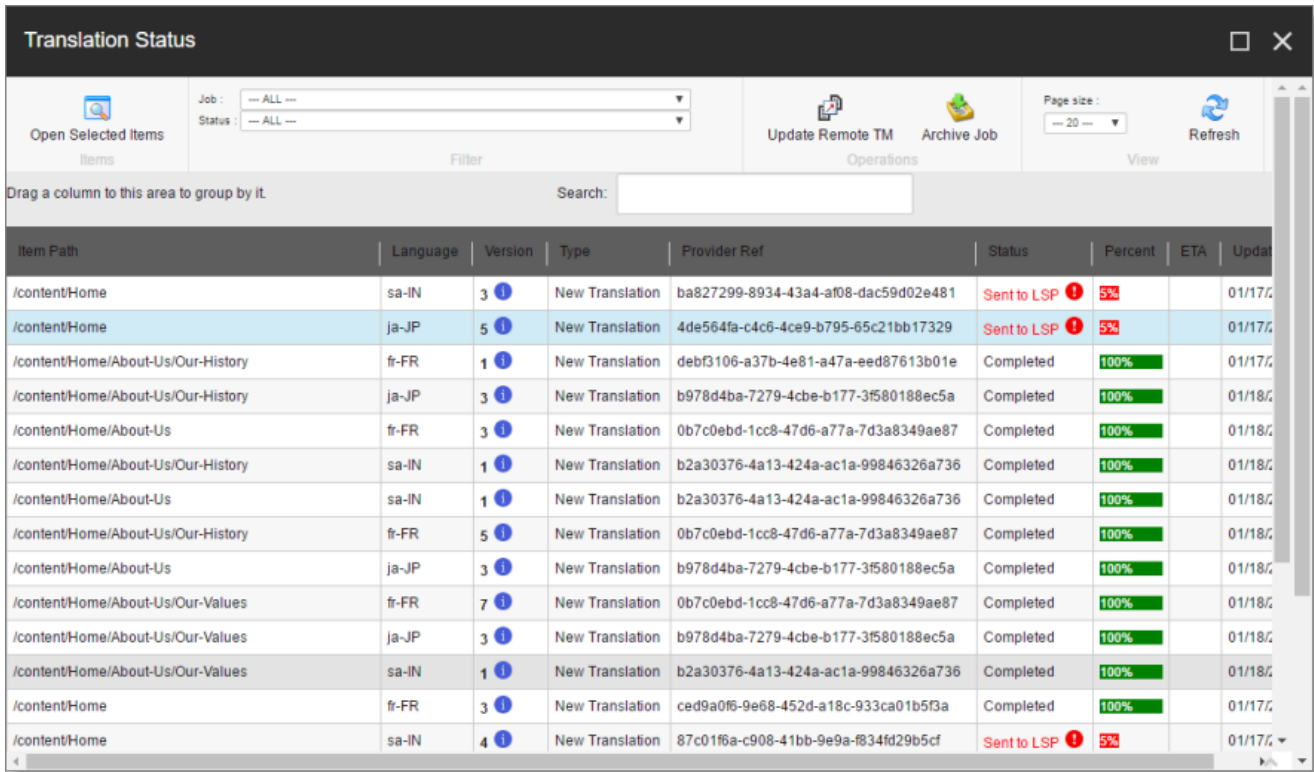
► Do one of the following to open the Translation Status window:

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



- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Status** from the menu. (Sitecore 6 and 7 only)


The **Translation Status** window opens, displaying the translation status of all content items that you submitted. By default, the content items are sorted by path. For information on changing the sort order and other features when working with lists, see page 15.




If you are assigned to the `sitecore\Translation Administrator` role, the following check boxes are displayed:

- **Show jobs from all users:** Select this check box to view *all* submitted content items.
- **Show archived jobs:** Select this check box to view archived jobs.

This window displays the following information about each content item:

Column	Description
Item Path	The path and name of the content item.
Language	The target Connector language code for the content item.
Version	The incremental version number of the source content item. If the target version (translation) of an item is not the latest version, then, in the <b>Version</b> column: <ul style="list-style-type: none"> <li>■ The version number is displayed in bold.</li> <li>■ An information icon  is displayed. Clicking this icon displays a message that the current translated item is not the latest version of the item.</li> </ul>



Column	Description
Type	This is one of the following: <ul style="list-style-type: none"> <li>■ <b>New Translation:</b> New translation requested.</li> <li>■ <b>Fix Translation:</b> Translation correction requested.</li> <li>■ <b>Use Local TM:</b> New translation requested for changed content. For unchanged content, the Connector copies the original translation to the target version.</li> <li>■ <b>Copy to Target:</b> Source content copied to target without translation.</li> </ul>
Provider Ref	The Lionbridge Freeway project ID. Displayed only when the translation provider is Lionbridge Freeway.
Status	The translation status of the content item. For a list and description of translation statuses, see page 69. If an error has occurred, the status is displayed in red. To view details about the error in the translation process, click the error icon  . A message box opens, displaying identifying information and the error message.
Percent	The percentage of the content item that has been translated, which is based on the translation status. For details, see page 69. <b>Tip:</b> To view identifying information about this item, click the percentage. This information is useful when contacting Clay Tablet Technical Support. For example, if your translation is delayed but an error is not displayed, this information can help Clay Tablet Technical Support determine the reason for the delay.
ETA	The date that the translation provider expects the translation of the content item to be complete, in MM/DD/YYYY format.
Updated	The date the content item was updated, in MM/DD/YYYY format.

## Actions

You can perform the following actions in the Translation Status window:

- ▶ To change the number of items displayed on a page in the window, select a number from the **Page size** dropdown list. By default, 20 items are displayed on a page.
- ▶ To display only content items for a particular translation job, select the job from the **Job** dropdown list and click **Refresh**.
- ▶ To display only content items with a particular translation status, select the status from the **Status** dropdown list and click **Refresh**.

**Note:** You can select **Error Only**, to display only items with error messages about the translation process.

- ▶ To update a remote TM (translation memory) server with the latest changes from multiple items in a single translation job, select the job from the **Job** dropdown list, then select multiple items, and click **Update Remote TM**. For detailed instructions, see "[Updating a Remote TM for Multiple Items](#)" on page 103.
- ▶ To archive a completed job so that it will no longer be displayed in this window, select it from the **Job** dropdown list, and click **Archive Job**. A message box opens, confirming that you want to archive the specified job. Click **OK** to proceed. Available only if you are assigned to the `sitecore\Translation Administrator` role. For detailed instructions, see "[Archiving Completed Jobs](#)" on page 93.

**Recommendation:** Archive only completed jobs. If you archive a job that is in progress (for example, with `In Translation` status), then the Connector will no longer process the content items in that job.

- ▶ To un-archive an archived job so that it that it is active again, select it from the **Job** dropdown list, and click **Unarchive Job**. A message box opens, confirming that you want to un-archive the specified job. Click **OK** to proceed. Available only if you are assigned to the `sitecore\Translation Administrator` role.
- ▶ To specify the number of items displayed on a page, select it from the **Page size** list. You can select from 20 (default), 50, 100, and 200. Use the scroll bar to scroll down to the items at the bottom of the page.
- ▶ To view one or more content items, select them, and click **Open Selected Items**. Each content item opens in the **Content** tab in a separate browser window.
  - If the translation has `Completed` status, the Content tab displays the translated version.
  - If the translation has `Sent to CTT` status (for a correction request), the Content tab displays the translated version.
  - Otherwise, the Content tab displays the source version.
- ▶ To refresh the list of content items in the window based on a new selection in the **Job** or **Status** filters, or newly created content items, click **Refresh**.
- ▶ To navigate to another page in the list, click a button in the navigation bar below the list. For detailed instructions, see page 16.
- ▶ To group content items by a column, click the column heading. While you hold down the cursor, drag the column heading to the **Drag a column to this area to group by it** area above the list on the left. For details, see page 19.
- ▶ To search for one or more content items in the list, enter the search criteria in the **Search** box in the top right corner of the list, and press `Enter`. The Connector searches all columns and displays only items that match the search criteria.

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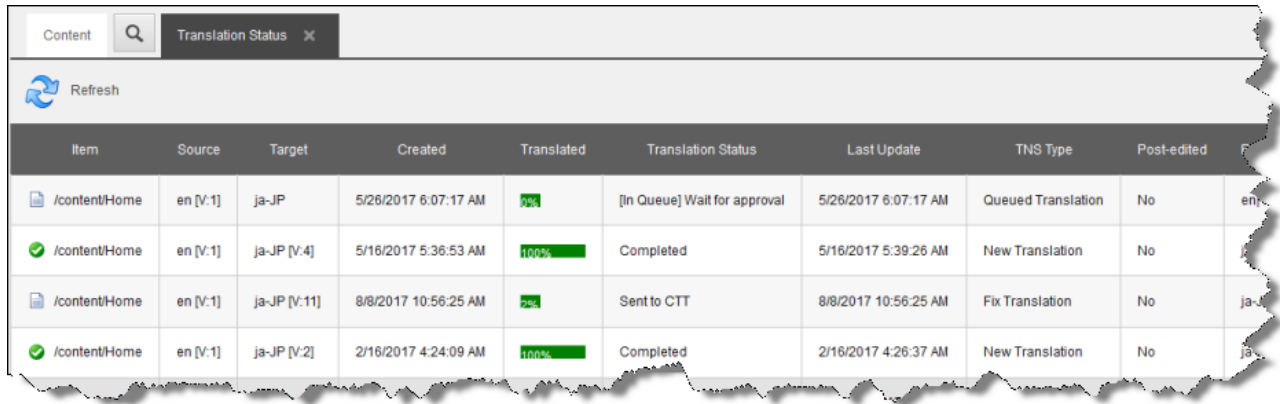
## 5.4 Monitoring Status for a Single Item

You can view the translation status of a single content item, or of a group of content items under a common root folder.

1. Navigate to the content item whose translation status you want to check.
2. In the **Sitecore Content Editor** ribbon, click the **CTC Translation** tab.
3. In the **Translation Tools** section, click **Item Translation Details**.



The **Translation Status** tab for the content item opens.



This tab displays the following translation-status information about the selected content item and any child items:


**Note:** The Translation tab is blank if either the content item has not been sent for translation, or it was sent to the Translation Queue, and then it was removed from the queue.

Column	Description
Item	<p>This is the item path and name. The preceding icon indicates the translation status, as described below:</p> <ul style="list-style-type: none"> <li>■  One of the following statuses: Completed; No field to translate.</li> <li>■  All other statuses.</li> </ul> <p>For a list and description of translation statuses, see page 69.</p>
Source	<p>The ISO code of the source language and the version number of the source content. For example, if this content item is in English, and it is the first version, this is en [V:1].</p>
Target	<p>The regional ISO code of the target language and the version number of the target content. For example, if this content item is in Japanese, and it is the first version, this is ja-JP [V:1].</p> <p><b>Note:</b> If there are multiple translation targets, then multiple regional ISO codes and version numbers are displayed.</p>

Column	Description
Created	The date and time when the content item was created, in the following format: MM/DD/YYYY HH:MM:SS.
Translated	A percentage indicating how much of the content item has been translated. This is based on the translation status, which is described in " <a href="#">Translation Statuses</a> " on page 69.
Translation Status	For a list and description of translation statuses, see page 69.
Last Update	The date and time when the content item was last updated, in the following format: MM/DD/YYYY HH:MM:SS.
TNS Type	Translation type. This is one of the following: <ul style="list-style-type: none"> <li>■ New Translation: New translation requested.</li> <li>■ Fix Translation: Translation correction requested.</li> <li>■ Use Local TM: New translation requested for changed content. For unchanged content, the Connector copies the original translation to the target version.</li> <li>■ Copy to Target: Source content copied to target without translation.</li> <li>■ Queued Translation: Content is in Translation Queue.</li> </ul>
Post-Edited	Indicates whether the translated version of the content item was edited after translation. It has one of the following values: <ul style="list-style-type: none"> <li>■ Yes</li> <li>■ No</li> </ul>
Reference	The regional ISO language code and version of an item. <ul style="list-style-type: none"> <li>■ For an item that has not been sent out for translation yet, for example, an item in the Translation Queue, it refers to the source language and version of the item that will be translated.</li> <li>■ For an item that has already been sent out for translation, it refers to the target language and version.</li> </ul>

## Actions

When you are viewing the translation status, you can also perform the following actions:

- ▶ To refresh the translation status information for the content items in the list, click the Refresh button  at the top of the tab.
- ▶ To remove a content item from the Translation Queue, so that the Connector will not send it for translation, select it, right-click, and select **Remove from the Translation Queue** from the context menu. Available only

for items that have not been translated yet and are in the Translation Queue, with [In Queue] Wait for approval or Sent to CTT status.

- ▶ To approve a content item for translation in the Translation Queue, so that the Connector will send it for translation, select it, right-click, and select **Approve this queue item for translation** from the context menu. Available only for items that have not been translated yet and are in the Translation Queue, with [In Queue] Wait for approval or Sent to CTT status.
- ▶ To update a remote TM (translation memory) with source content that was edited after it was sent for translation, select it, right-click, and select **Send post-edited content to Update a remote TM** from the context menu. Available only for items that have already been translated, with Completed status. For details, see "[Updating a Remote Translation Memory \(TM\)](#)" on page 100.
- ▶ To request a correction of translated content, select the corresponding source content item, right-click, and select **Request Translation Correction** from the context menu. Available only for items that have already been translated, with Completed status. For details, see "[Requesting Translation Corrections](#)" on page 97.
- ▶ To update additional target languages to match the updated translated content, select the corresponding source content item, right-click, and select **Synchronize Translated Versions** from the context menu. Available only for items that have already been translated, with Completed status. For detailed instructions, see "[Synchronizing Translation of Other Target Languages](#)" on page 95.

## 6 Monitoring Items in a Workflow with the Enhanced Workbox

Clay Tablet's optional enhanced Workbox has more features than the standard Sitecore Workbox. These features help you manage large lists of content items in a workflow. You can sort by different column headings, approve many items at once, and easily manage the display of long lists.

**Important:** Important: The enhanced Workbox is an optional feature that modifies the standard Sitecore Workbox. It must be installed as a separate package. For installation instructions, refer to the *Clay Tablet Connector for Sitecore Installation and Configuration Guide*.

You open the enhanced Workbox the same way that you open the standard Sitecore Workbox.

### To open the enhanced Workbox:

- In the Sitecore Desktop, click the **Sitecore** menu, and then select **All Applications > Workbox** from the menu. (Sitecore 6 and 7 only)
- In the Sitecore Content Editor, either:
  - Click the **Workbox** link in the bottom left corner of the Content Editor.
  - Click the dropdown arrow in the top right corner of the Content Editor and select the **Workbox** link.

When you open the Workbox, it displays all content items in a workflow, grouped first by workflow (if multiple workflows are selected), and then by workflow state.



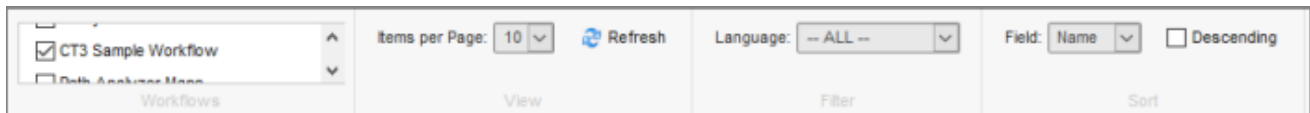
In the enhanced Workbox, you can perform actions on all content items in a workflow, on all content items in a workflow state, or on individual content items.

- For information about displaying content items in the Workbox, see page [79](#).
- For information about viewing and receiving updates for all content items in a workflow, see page [80](#).
- For information about viewing and receiving updates for all content items in a workflow state, see page [80](#).
- For information on viewing detailed information about content items, see page [81](#).
- For information on changing the workflow state of a single content item, see page [83](#).


- For information on changing the workflow state of multiple content items, see page 85.
- For information about comparing multiple version of a content item, see page 87.
- For information on viewing the history of workflow-state changes to a content item, see page 86.

## 6.1 Displaying Content Items in the Workbox

The Workbox ribbon includes many features for controlling which content items to display in the Workbox and how to display these items.



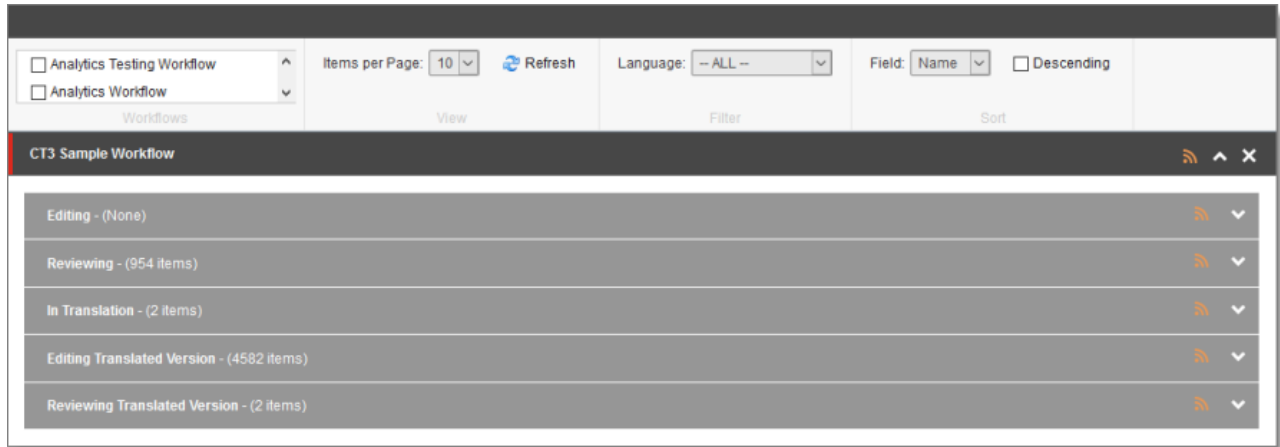
Ribbon Section	Description of Functionality
Workflows	Select the check box for one or more workflows. The Workbox displays the content items assigned to these workflows. The top-level grouping of content items is by workflow.
View	In the <b>Items per Page</b> dropdown list, select the number of content items to display within a page in a workflow-state section, or select All. <b>Note:</b> You can click page numbers in the bottom-right corner of each page to navigate.
Filter	In the <b>Language</b> dropdown list, select the language of the content items to view, or to view content items in all languages, accept the default, -- ALL --. Depending on the workflow state of the content item, this may be the source or target language: <ul style="list-style-type: none"> <li>■ Editing, Reviewing, Sending for Translation, and In Translation workflow states: source language of the content item.</li> <li>■ Editing Translated Version, Reviewing Translated Version, and Done workflow states: target language of the content item.</li> </ul>
Sort	In the <b>Field</b> dropdown list, select the field for sorting the content items in the Workbox. By default, the content items are displayed in descending order by the specified field. To sort the content items in ascending order, clear the <b>Descending</b> check box. <b>Note:</b> All content items are grouped first by workflow and then by workflow state before they are sorted.

- ▶ To refresh the Workbox based on your changes, click **Refresh** .

## 6.2 Viewing Workflow Details and Receiving Updates



You can view the number of content items in a workflow and subscribe to updates about these items.

- ▶ If the workflow section is not already expanded, click  (Sitecore 6 and 7) or  (Sitecore 8) to expand it.



You can now see the all the workflow states in the workflow, and the number of content items assigned to each workflow state.

You can perform the following actions:




- ▶ To subscribe to an RSS feed of a workflow, so that you will be modified of any workflow-state changes to content items assigned to this workflow, click  in the top-right corner of the workflow section.
- ▶ To collapse an expanded workflow section, click .
- ▶ To close a workflow section, click the Close (X) box in the top-right corner.

**Note:** This clears the selected check box for the workflow, in the **Workflows** section of the ribbon.

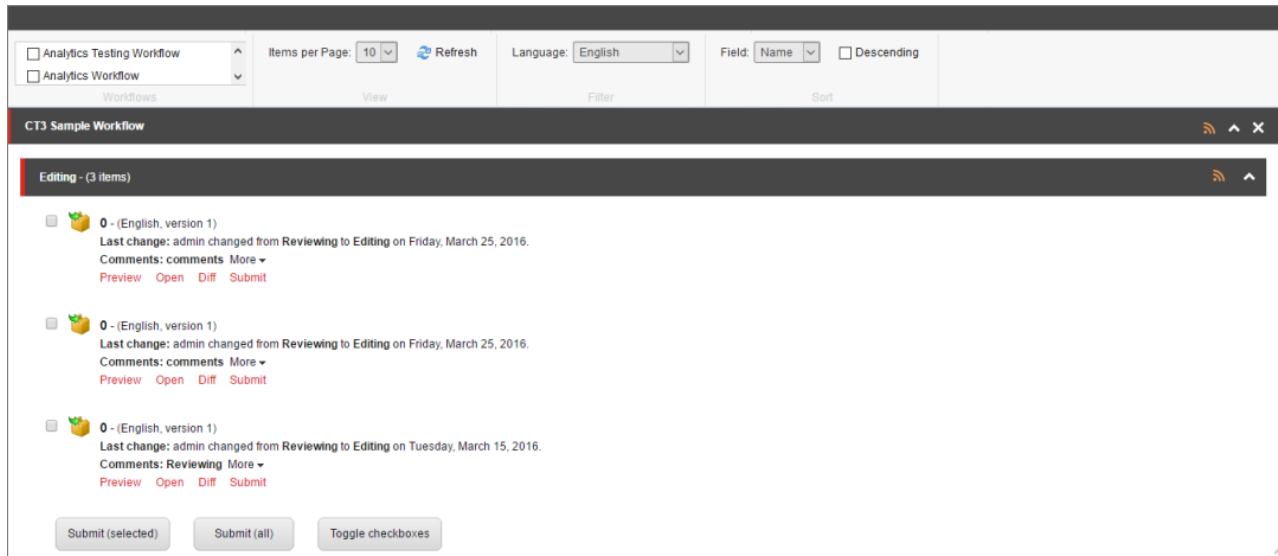
---

## 6.3 Viewing All Content Items in a Workflow State and Receiving Updates

You can view the content items in a workflow state and receive updates about them.

1. If the workflow section is not already expanded, click  to expand it.
2. Click  (Sitecore 6 and 7), click  or click the title, which is the name of the workflow state, to expand the corresponding workflow-state section.







You can now see all the content items in that workflow state.

In the screen captures, the content items assigned to the `CT3 Sample Workflow` workflow are displayed in the Workbox. The section for the `Editing` workflow state is expanded, while the sections for the other workflow states are collapsed.



**Note:** If the number of items in a workflow state exceeds the number specified in the **Items per Page** setting, click a number in the bottom-right corner of the section to navigate to a different page, where you can see additional content items. To change the **Items per Page** setting, select another number, or `All`, from the dropdown list in the **View** section of the Workbox ribbon.

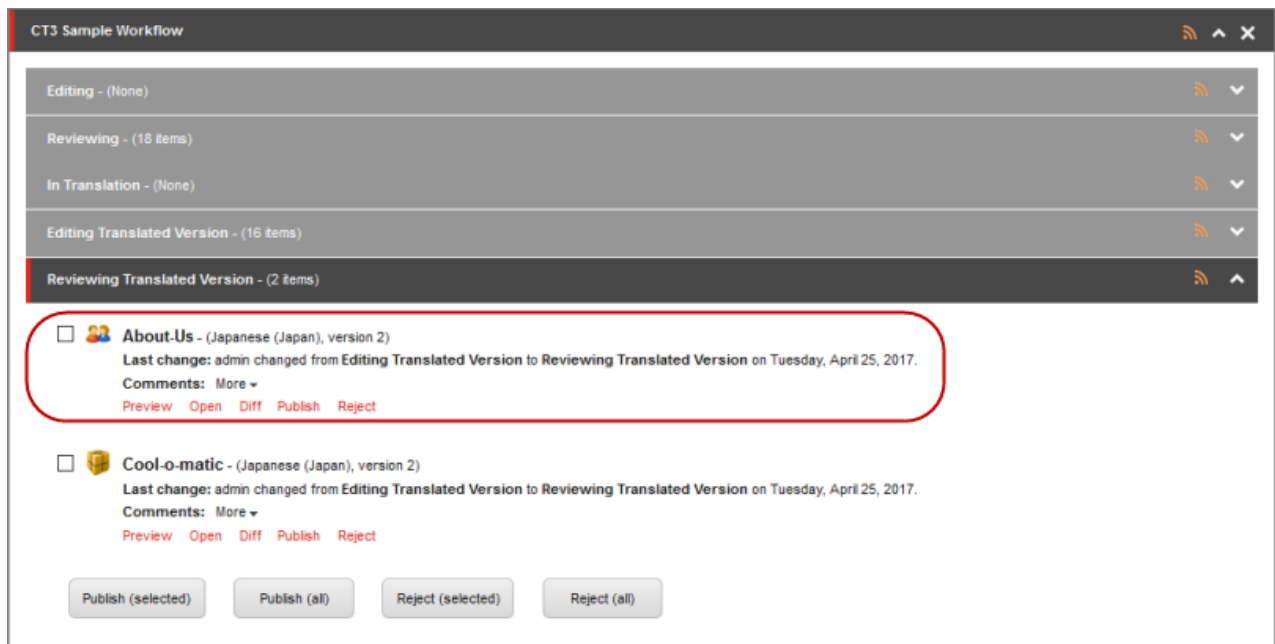
You can perform the following actions in a workflow-state section:

- ▶ To subscribe to an RSS feed of a workflow state, so that you will be notified of any workflow-state changes to content items in this state, click .
- ▶ To collapse an expanded workflow-state section, click , or click the title of the section.
- ▶ To view details about the content items in this state, see page [81](#).
- ▶ To change the workflow state of a single content item, see page [83](#).
- ▶ To change the workflow state of multiple content items, see page [85](#).
- ▶ To view the history of workflow-state changes to a single content item, see page [86](#).
- ▶ To compare multiple versions of a single content item, see page [87](#).

## 6.4 Viewing Content Item Details

You can view detailed information about a content item in a specific workflow and workflow state.



1. Ensure that the section for the workflow to which the content item is assigned is displayed in the Workbox. If it is not displayed, select the corresponding check box in the **Workflows** section of the Workbox ribbon. For details, see page 79.
2. Ensure that the section for the workflow to which the content item is assigned is expanded. If it is not expanded, click  to expand it.
3. Ensure that the section for the workflow-state section to which the content item is assigned is expanded. If it is not expanded, click , or click the title of the section, which is the name of the workflow state, to expand it.



When a workflow-state is expanded, you can see detailed information about a content item. The screen capture shows the section for the *Editing Translated Version* workflow state collapsed, while the section for the *Reviewing Translated Version* workflow state is expanded. The information in brackets below indicates the information in the highlighted area in the screen capture above.



- The name of the content item (*About-Us*).
- The language of the content item (*Japanese, Japan*). Depending on the workflow state of the content item, this may be either the source or the target language:
  - *Editing, Reviewing, Sending for Translation, and In Translation* workflow states: source language of the content item.
  - *Editing Translated Version, Reviewing Translated Version, and Done* workflow states: target language of the content item.
- The version number of the content item in the specified language (*version 2*).
- The last change in the workflow state of the item, the user who made this change, the previous and current workflow states, and the date of this change (*admin changed from Editing Translated Version to Reviewing Translated Version on Tuesday, April 25, 2017.*).

You can also perform the following actions on any content item:

- ▶ To open a content item in the Sitecore Content Editor, click the name of that item or click **Open** .
- ▶ To view a preview of a content item in the layout for the current device, click **Preview** .

## 6.5 Changing the Workflow State of Individual Content Items

You can change the workflow states of one or more content items in a workflow. The changes you can make depend on the workflow state of the items.

1. Ensure that the section for the workflow to which the content item is assigned is displayed in the Workbox. If it is not displayed, select the corresponding check box in the **Workflows** section of the Workbox ribbon. For details, see page 79.
2. Ensure that the section for the workflow to which the content item is assigned is expanded. If it is not expanded, click  to expand it.
3. Ensure that the section for the workflow-state section to which the content item is assigned is expanded. If it is not expanded, click , or click the title of the section, which is the name of the workflow state, to expand it.



The screen capture shows the section for the **Reviewing** workflow state expanded. In this state, the **Publish** action is available.



4. You can perform one of the following state-specific actions. The available actions depend on the content item's workflow state. Refer to the table below for a list and description of actions you can perform on content items in different states of the CT3 *Sample Workflow* workflow.

Action	Description	Available in these Workflow States				
		Editing	Reviewing	In Translation	Editing Translated Version	Reviewing Translated Version
Submit	Submits a content item to the next workflow state.	✓			✓	
Publish	Publishes the content item: <ul style="list-style-type: none"> <li>■ Reviewing: publishes in the source language.</li> <li>■ Reviewing Translated Version: publishes in the target language.</li> </ul>		✓			✓
Reject	Rejects the content item, so that it is not publishable: <ul style="list-style-type: none"> <li>■ Reviewing: rejects content in the source language.</li> <li>■ Reviewing Translated Version: rejects content in the target language.</li> </ul>		✓			✓
Translate	Opens a dialog box for specifying translation settings before sending this content item for translation.		✓			
Language Translated	Moves a content item to the next workflow state, Editing Translated Version.			✓		

## 6.6 Changing the Workflow State of Multiple Content Items

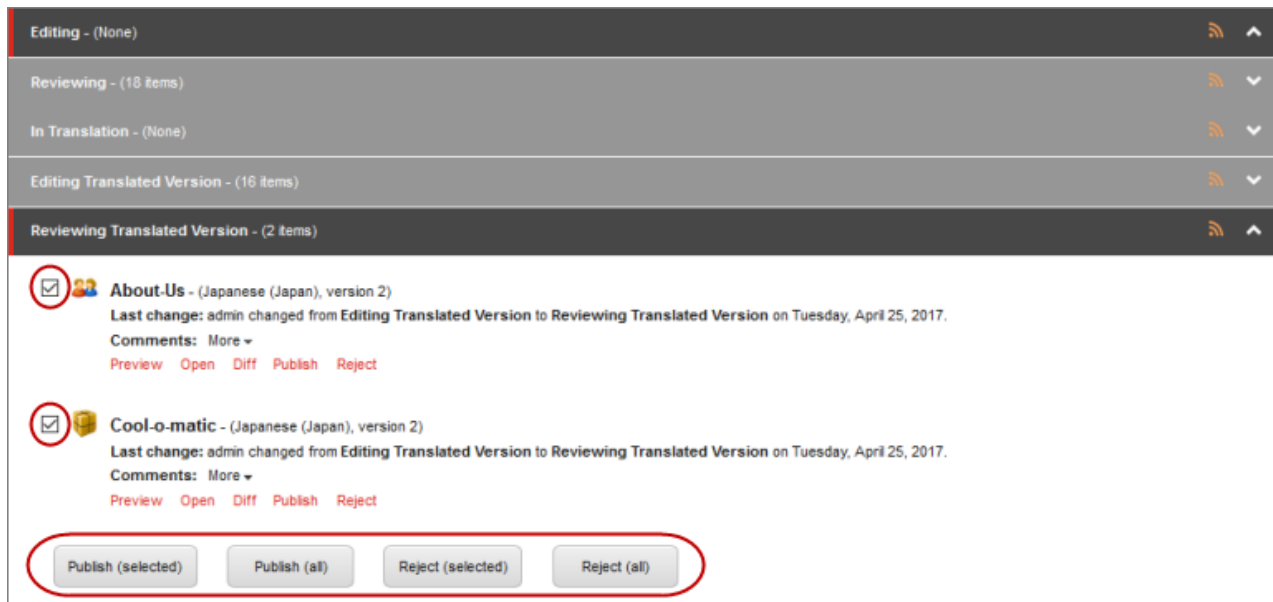
You can perform any workflow-state-specific actions on multiple content items that are in the same workflow state. For example, you can publish or reject multiple content items in the *Reviewing Translated Version* workflow state. Different actions are available, depending on the workflow state, as described in "[Changing the Workflow State of Individual Content Items](#)" on page 83.

To change the workflow state of multiple content items:

1. Ensure that the section for the workflow to which the content item is assigned is displayed in the Workbox. If it is not displayed, select the corresponding check box in the **Workflows** section of the Workbox ribbon. For details, see page 79.
2. Ensure that the section for the workflow to which the content item is assigned is expanded. If it is not expanded, click  to expand it.
3. Ensure that the section for the workflow-state section to which the content item is assigned is expanded. If it is not expanded, click , or click the title of the section, which is the name of the workflow state, to expand it.
4. Optional. Select the check boxes for the content items for which you want to perform the common action.

**Note:** If you want to perform the action on all the content items in the workflow-state section, skip this step.

5. If necessary, scroll down to the bottom of the page of the workflow-state section, so that the toolbar at the bottom of the section is displayed.



The screen capture shows the *Reviewing Translated Version* workflow state expanded. In this state, the **Publish** and **Reject** actions are available.



**Note:** The available actions depend on the workflow state. Refer to the table in "[Changing the Workflow State of Individual Content Items](#)" on page 83 for a list and description of actions you can perform on content items in different states of the CT3 Sample Workflow workflow.

6. Click the icon in the toolbar for the action you want to perform.

**Tip:** Click the **Toggle checkboxes** icon to toggle your check box selection.

## 6.7 Viewing the History of Workflow-State Changes to a Content Item

You can view the history of workflow-state changes to a content item.

1. Ensure that the section for the workflow to which the content item is assigned is displayed in the Workbox. If it is not displayed, select the corresponding check box in the **Workflows** section of the Workbox ribbon. For details, see page 79.
2. Ensure that the section for the workflow to which the content item is assigned is expanded. If it is not expanded, click  to expand it.
3. Ensure that the section for the workflow-state section to which the content item is assigned is expanded. If it is not expanded, click , or click the title of the section, which is the name of the workflow state, to expand it.
4. In the workflow-state section, locate the content item whose history you want to view.
5. To view the history of workflow-state changes to a content item, click **More**.

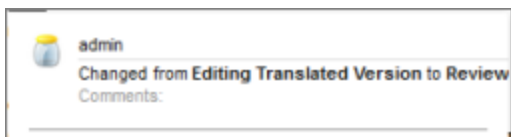


A window opens, displaying information about each change in the workflow state of this content item. The information in brackets below indicates the information in the screen capture below:

- The user name of the user who changed the workflow state of this item (admin).
- The date of the change to the workflow state of this item (Tuesday, April 25, 2017).

**Tip:** Use the scroll bar to scroll to the right side of the window, which displays the date.




- The previous and new workflow state. When an item is created, Item created is displayed.



6. When you are done viewing the history of the item, click the Close box (X) in the top-right corner to close the window.

## 6.8 Comparing Multiple Versions of a Content Item

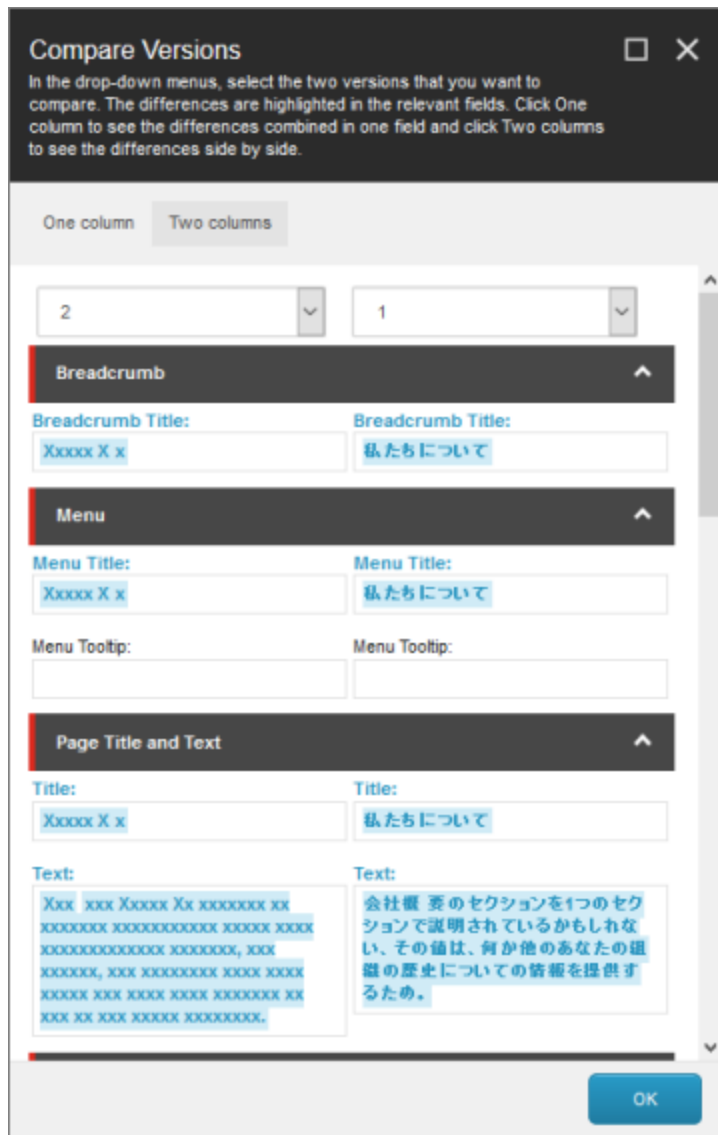
You can compare multiple versions of a content item.


1. Ensure that the section for the workflow to which the content item is assigned is displayed in the Workbox. If it is not displayed, select the corresponding check box in the **Workflows** section of the Workbox ribbon. For details, see page 79.
2. Ensure that the section for the workflow to which the content item is assigned is expanded. If it is not expanded, click  to expand it.
3. Ensure that the section for the workflow-state section to which the content item is assigned is expanded. If it is not expanded, click , or click the title of the section, which is the name of the workflow state, to expand it.
4. In the workflow-state section, locate the content item whose versions you want to compare.
5. Under the content item, click **Diff** .

**Note:** This is not meaningful for `version 1` of a content item.

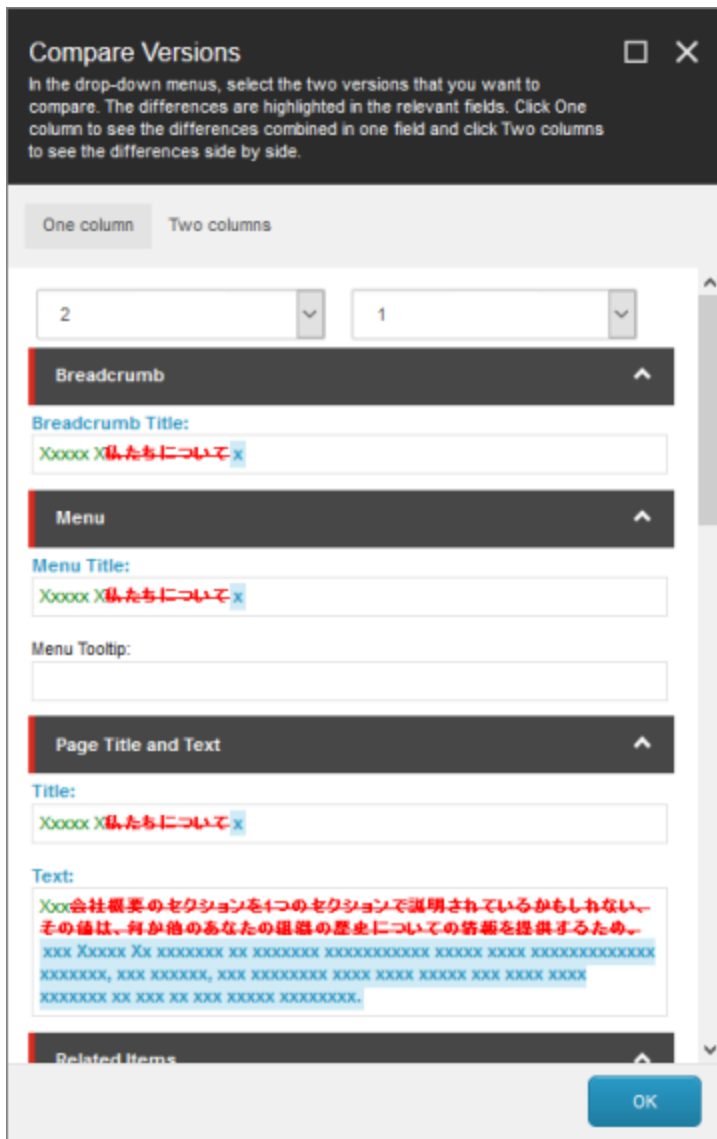


The Compare Versions box opens, displaying the newer version in the left column, and the older version in the right column. The differences are displayed in blue bold.



- ▶ To view different versions of this content item, select the version numbers from the dropdown lists at the top of the box.
- ▶ To collapse a section, click the collapse button .
- ▶ To view the differences between versions of this content item in a single column, click **One Column** in the top-left corner of the box.





- The new text is displayed in green bold.
- The old text is displayed in red bold with strikethrough.
- ▶ When you are done, click **OK** to close the Compare Versions box.

## 7 Reviewing Translated Content

After your translation providers translate your content, the Connector automatically delivers it back into Sitecore. Each translation is available in the correct language version for each item. When the translated content returns from translation, its workflow state is *Reviewing Translated Version*.

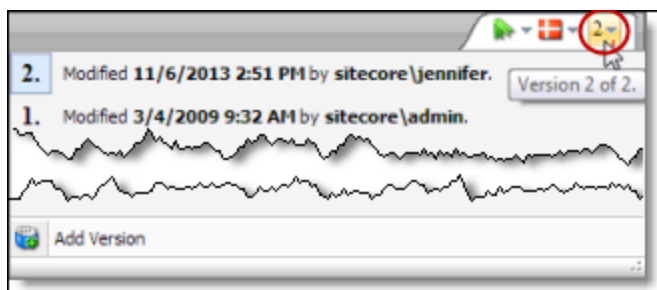
### To view translated content in Sitecore 6 and 7:

1. Navigate to the content item whose translation you want to view.
2. In the **Sitecore Content Editor** ribbon, click the **Review** tab.
3. In the top-right corner of the **Content** tab, click the flag icon representing the default source language.

The Language list opens, displaying all the available target languages. Under each language is the number of available versions for each language.

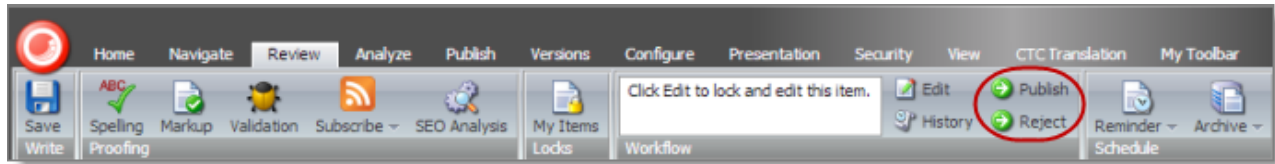


4. Select the desired target language from the list to view the translation. By default, the latest version of the translation is displayed.
5. Optional. To view a different version of the translation, click the version icon, to the right of the flag icon, and select the desired version to view.



The translation of the content item is displayed.

6. Scroll down to review the translated content.
7. In the **Workflow** section of the **Review** tab, either approve or reject the translation:

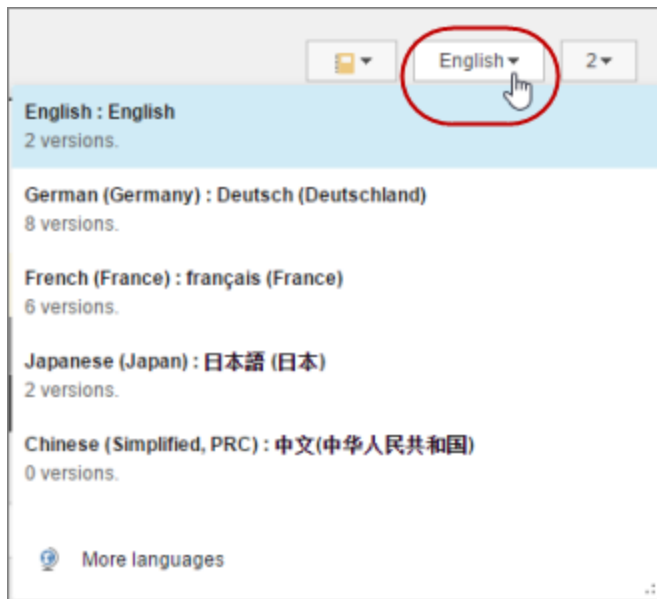


- To approve the translation, click the **Publish** button. Its workflow state immediately changes to `Done`. The translated content may be immediately available for publishing, depending on your workflow configuration and whether the `Done` state is configured as publishable.
- To reject the translation, click the **Reject** button. The workflow state changes to `Reviewing`, and the translation status remains `Completed`.

### To view translated content in Sitecore 8:

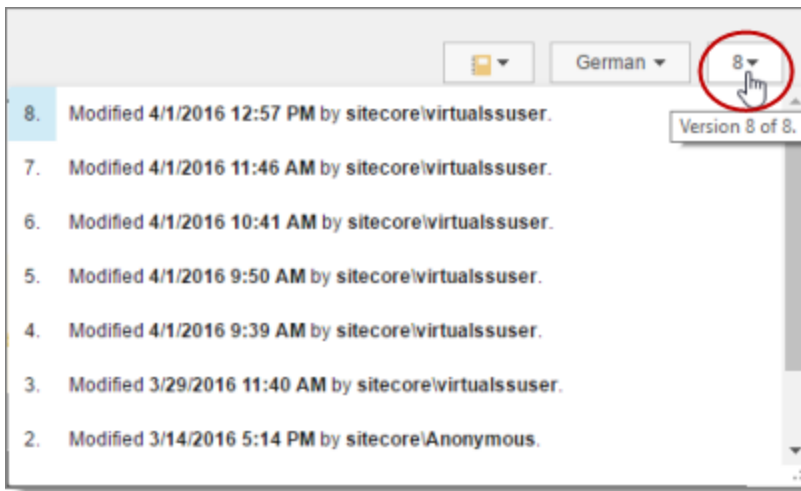
1. Navigate to the content item whose translation you want to view.
2. In the **Sitecore Content Editor** ribbon, click the **Review** tab.
3. In the top-right corner of the **Content** tab, click the default-source-language button.

The Language list opens, displaying all the available target languages. Under each language is the number of available versions for each language.



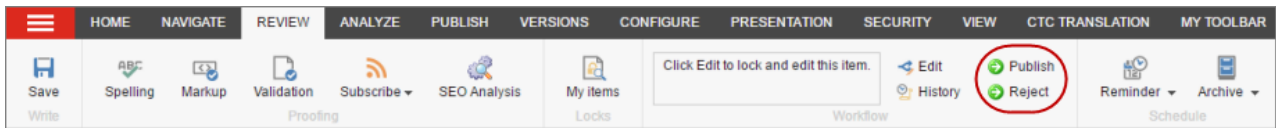
4. Select the desired target language from the list to view the translation. By default, the latest version of the translation is displayed.

- Optional. To view a different version of the translation, click the version button, to the right of the default-source-language button, and select the desired version to view.



The translation of the content item is displayed.

- Scroll down to review the translated content.
- In the **Workflow** section of the **Review** tab, either approve or reject the translation:



- To approve the translation, click the **Publish** button. Its workflow state immediately changes to **Done**. The translated content may be immediately available for publishing, depending on your workflow configuration and whether the **Done** state is configured as publishable.
- To reject the translation, click the **Reject** button. The workflow state changes to **Reviewing**, and the translation status remains **Completed**.

## 8 Post-Translation Features

After the translation is complete, approved, and published, you can perform the following additional optional tasks:

Task	Description	Details
archive translation	If you are assigned to the <code>sitecore\Translation Administrator</code> role, you can archive completed jobs.	page <a href="#">93</a>
synchronize translation	If a content item has been translated into multiple target languages, and you updated only one target language, you can use this feature to update additional target languages.	page <a href="#">95</a>
request a translation correction	If you find a mistake in the translated content, you can send a request to the translation provider to correct the translation and resend it.	page <a href="#">97</a>
update a remote TM server	You can update a remote TM (translation memory) server, used by your translation provider, with your latest changes to the translated content.	page <a href="#">100</a>
clear the translation backup data	You can clear the translation backup database. This database supports the following features: <b>Translation Correction</b> , <b>Update Remote TM</b> , and <b>SyncTranslation</b> .	page <a href="#">106</a>

### 8.1 Archiving Completed Jobs

You archive a translation job so that it will no longer be displayed in the Translation Status window.

Typically, you archive a translation job after all its assets have been translated and approved, when it is *inactive*, which means it has `Completed` status.

**Recommendation:** Archive only completed jobs. If you archive a job that is in progress (for example, with `In Translation` status), then the Connector will no longer process the content items in that job.

For a list and description of job statuses, see "[Translation Statuses](#)" on page [69](#).

Only users who are assigned to the `sitecore\Translation Administrator` role can archive jobs.

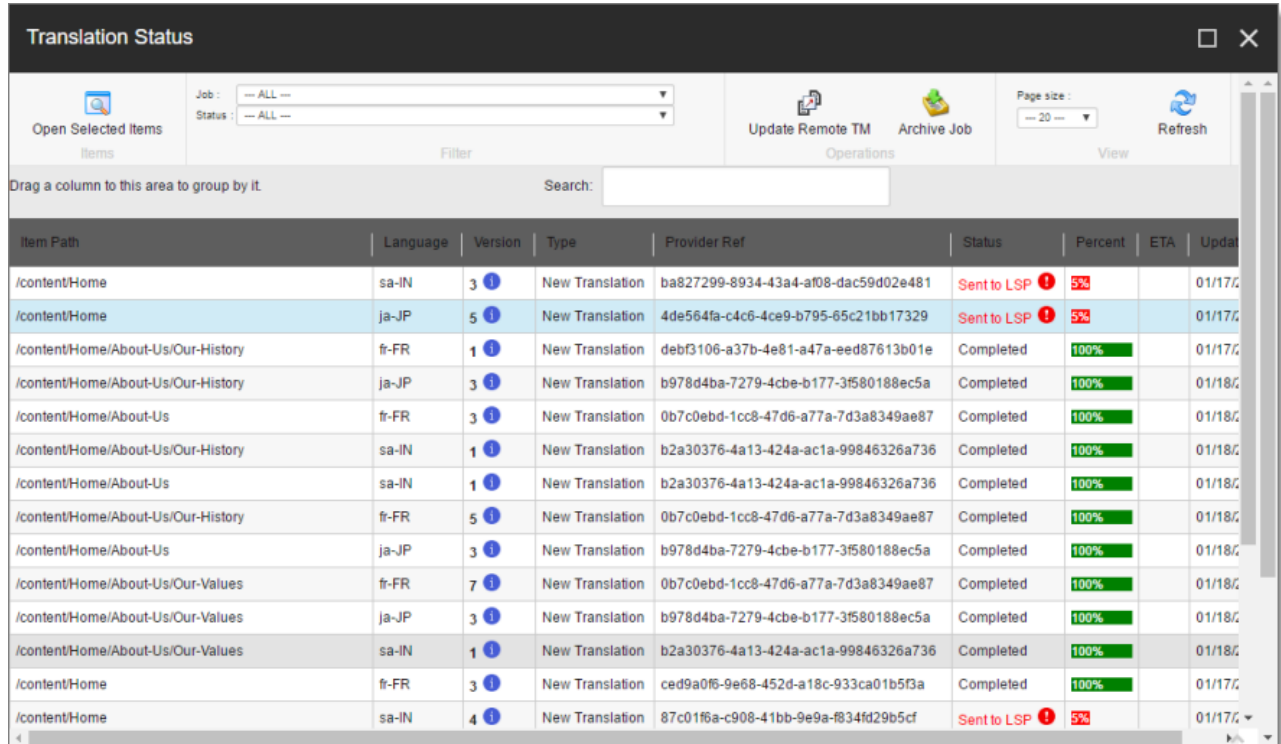
#### To archive a job:

- Do one of the following to open the Translation Status window:
  - In the **Sitecore Content Editor** ribbon, click the **CTC Translation** tab, and then in the **Translation Tools** section, click **Translation Status**.



- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Status** from the menu. (Sitecore 6 and 7 only)

The **Translation Status** window opens. For a detailed description of this window, see "[Monitoring Status for Multiple Items](#)" on page 71.



- Select the job to archive from the **Job** dropdown list.
- Click **Archive Job**.  
A message box opens, confirming that you want to archive the specified job.
- Click **OK** to proceed.

**Tip:** To un-archive an archived job so that it is active again, select it from the **Job** dropdown list, and click **Unarchive Job**. A message box opens, confirming that you want to un-archive the specified job. Click **OK** to proceed. Available only if you are assigned to the `sitecore\Translation Administrator` role.

## 8.2 Synchronizing Translation of Other Target Languages

After a content item is translated, you can update translated versions in other target languages with changes in the source language. This synchronizes translations of a content item in multiple target languages. This is useful if you changed the content in the source language, and updated the translation in one target language.

However, now, you want to update the content in the other target languages. You can specify at the field level which field types and target languages you want to update for the new content.

### To synchronize the translations of a content item:

- Navigate to the content item whose translations you want to synchronize and select it. Select an item that meets the following criteria:
  - It has already been translated, so it has `Completed` status.
  - Its translation is backed up in the database, so the value in the **TNS Backup** column is `Yes`.
- On the **Sitecore Content Editor** ribbon, click the **CTC Translation** tab.
- In the **Translation Tools** section, click **Item Translation Details**.



The **Translation Status** tab for the content item opens.

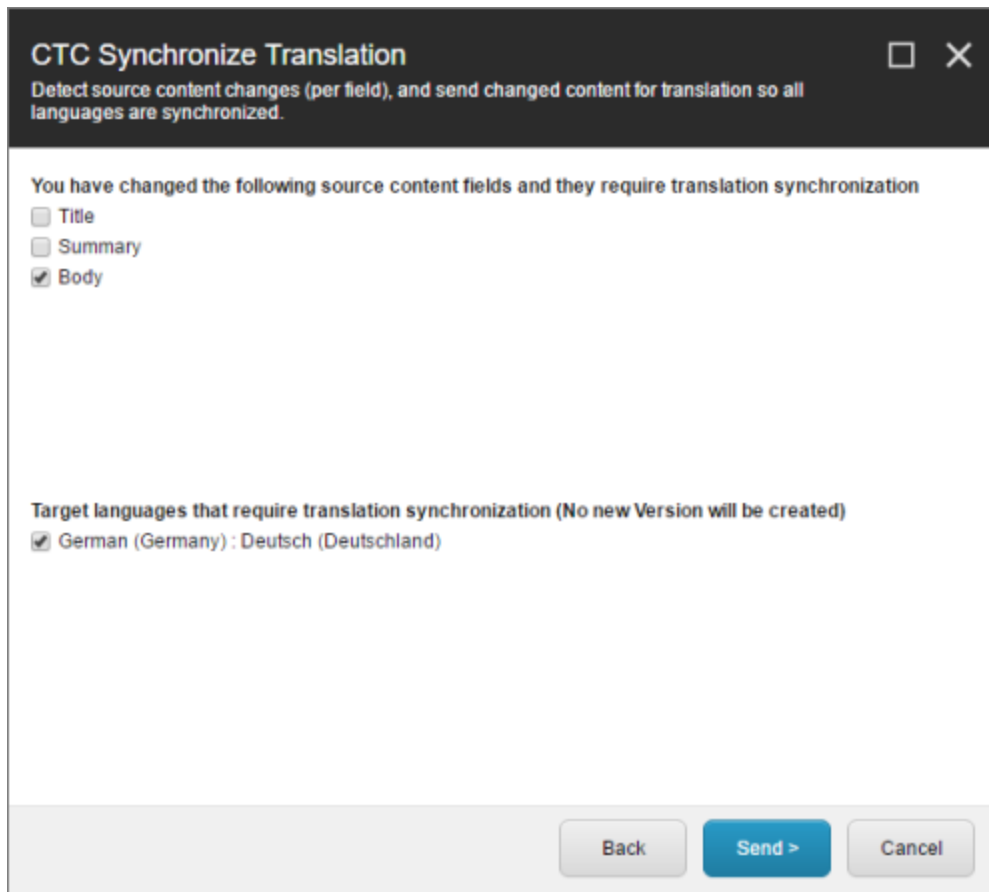
The screenshot shows the 'Translation Status' tab for a content item. It features a 'Refresh' button and a table with the following columns: Item, Source, Target, Created, Translated, Translation Status, Last Update, TNS Type, Post-edited, and a final column with a language code. The table contains four rows of translation jobs.

Item	Source	Target	Created	Translated	Translation Status	Last Update	TNS Type	Post-edited	
/content/Home	en [V:1]	ja-JP	5/26/2017 6:07:17 AM	50%	[In Queue] Wait for approval	5/26/2017 6:07:17 AM	Queued Translation	No	en
/content/Home	en [V:1]	ja-JP [V:4]	5/16/2017 5:36:53 AM	100%	Completed	5/16/2017 5:39:26 AM	New Translation	No	
/content/Home	en [V:1]	ja-JP [V:11]	8/8/2017 10:56:25 AM	50%	Sent to CTT	8/8/2017 10:56:25 AM	Fix Translation	No	ja
/content/Home	en [V:1]	ja-JP [V:2]	2/16/2017 4:24:09 AM	100%	Completed	2/16/2017 4:26:37 AM	New Translation	No	ja

This tab displays translation-status information about the selected content item and any child items. For a detailed description of this tab, see "[Monitoring Status for a Single Item](#)" on page 74.

- Select an item that has already been translated. This item has `Completed` status.
- Right-click, and select **Synchronize Translated Versions** from the context menu.

The main page of the wizard opens.



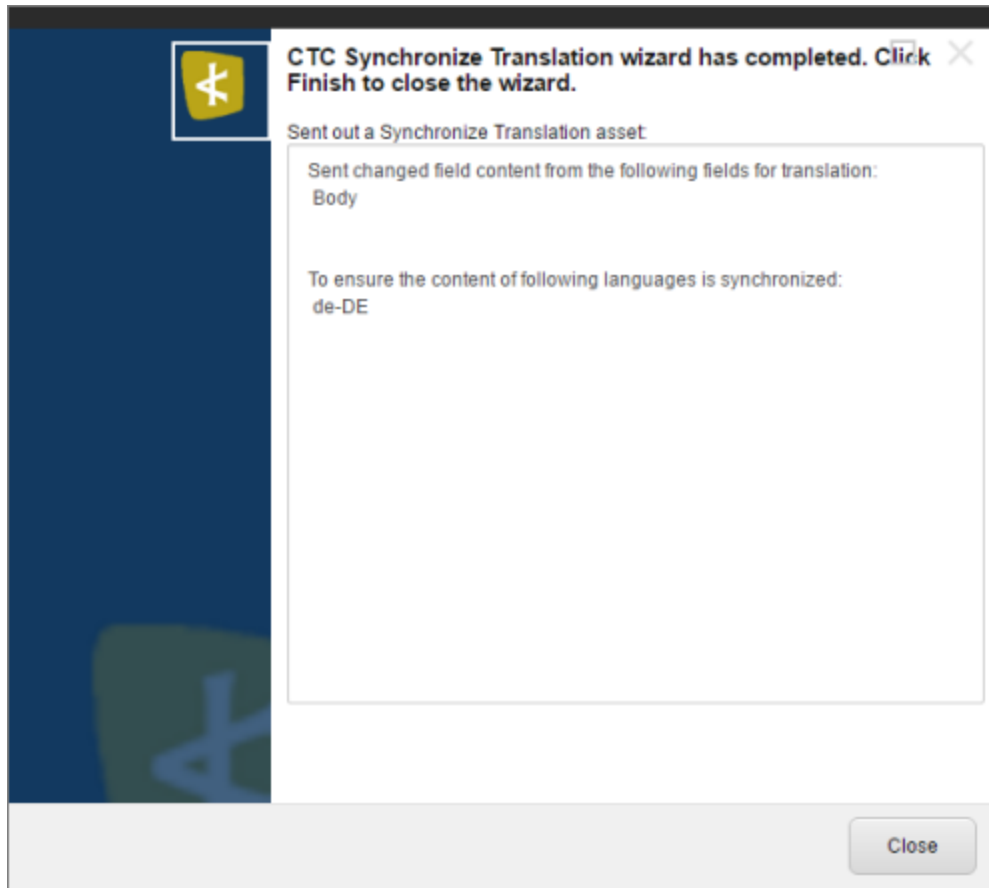
6. The first section displays a list of all field types in the content item that were updated, and that should be synchronized in the translated items.
  - Select the check boxes for the field types for which you want to synchronize the translation.
  - If there are field types for which you *do not* want to synchronize the translation, leave the check boxes cleared. The translations for fields of those field types will not be updated.
7. The second section displays the target languages that require translation synchronization.
  - Keep the check boxes selected for the target languages you want to synchronize.
  - If there are target languages you *do not* want to synchronize, clear the check boxes cleared. The translations for these languages will not be updated.
8. Click **Send**.

The Connector sends the changes in the selected field types for translation in the specified languages.

**Note:** The Connector does not create a new version for the synchronized translations.

The summary page of the wizard opens.





It displays the fields that the Connector sends for translation, and the target languages that will be synchronized.

9. Click **Finish**.

The wizard closes.

---

## 8.3 Requesting Translation Corrections

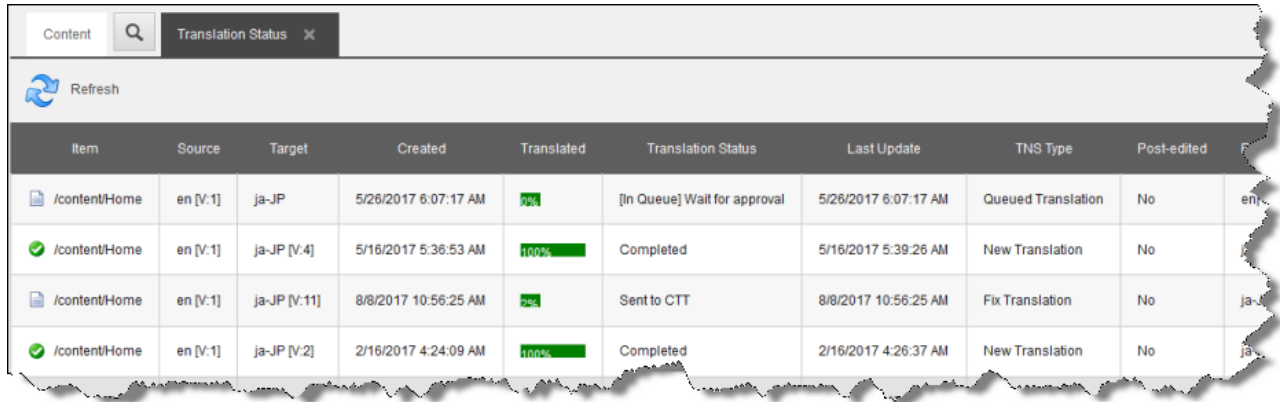
If you find a mistake in the translated content, you can send a request to your translation provider to correct the translation and resend it.

**Note:** If you have multiple translation providers, the Connector sends the correction request to the translator who originally translated the content.

1. In the **Sitecore Content Editor**, navigate to the content item for which you want to request a translation correction.
2. In the Sitecore Content Editor ribbon, click the **CTC Translation** tab.
3. In the **Translation Tools** section, click **Item Translation Details**.



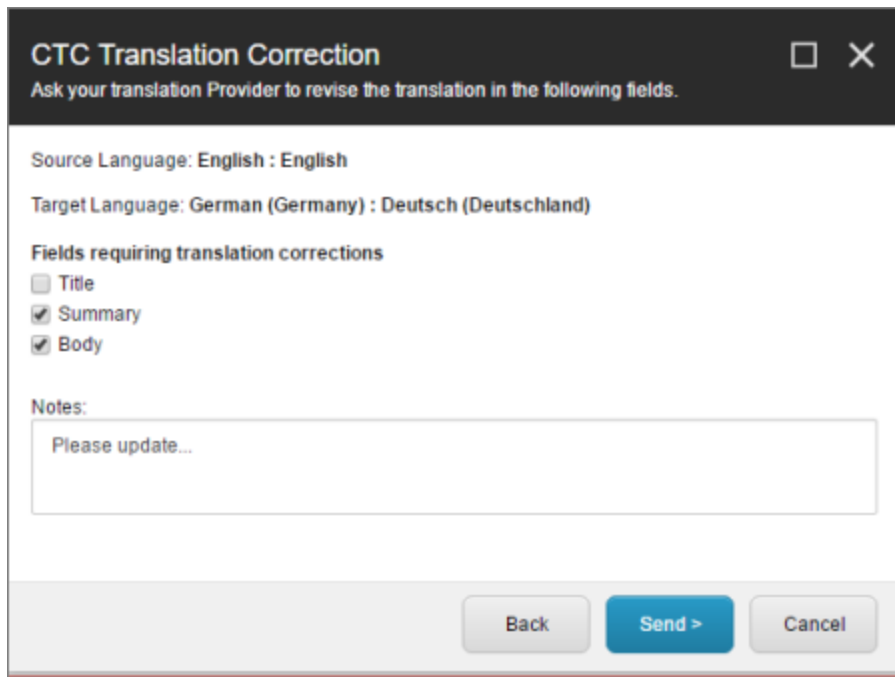
The **Translation Status** tab for the content item opens.



This tab displays translation-status information about the selected content item and any child items. For a detailed description of this tab, see ["Monitoring Status for a Single Item"](#) on page 74.

4. Select an item that meets the following criteria:
  - It has already been translated, so it has **Completed** status.
  - Its translation is backed up in the database, so the value in the **TNS Backup** column is **Yes**.
5. Right-click, and select **Request Translation Correction** from the context menu.

The main page of the wizard opens.

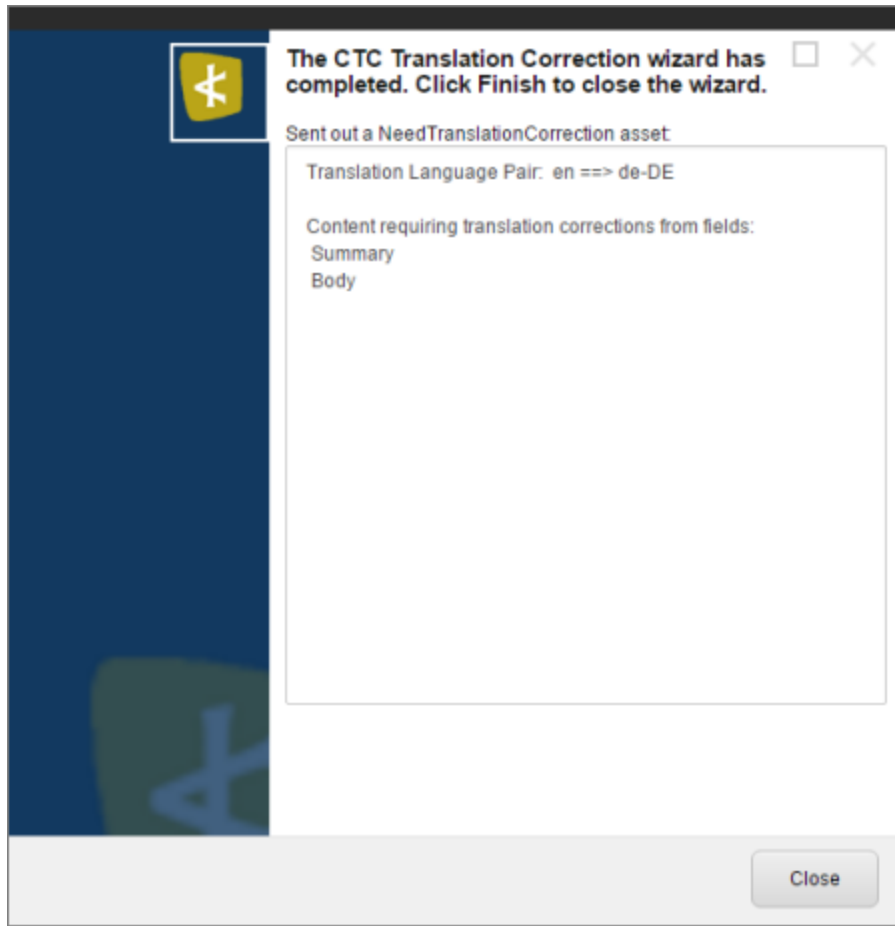


The screenshot shows a dialog box titled "CTC Translation Correction" with a close button (X) in the top right corner. Below the title bar, there is a subtitle: "Ask your translation Provider to revise the translation in the following fields." The main content area is divided into two sections. The first section displays the source and target languages: "Source Language: English : English" and "Target Language: German (Germany) : Deutsch (Deutschland)". Below this, there is a section titled "Fields requiring translation corrections" with three checkboxes: "Title" (unchecked), "Summary" (checked), and "Body" (checked). The second section is labeled "Notes:" and contains a text input field with the placeholder text "Please update...". At the bottom of the dialog, there are three buttons: "Back", "Send >" (highlighted in blue), and "Cancel".

6. The first section displays a list of all field types in the content item. Select the check boxes for the field types for which you want to request a correction.
7. In the second section, **Notes**, enter your correction request for the translation provider.
8. Click **Send**.

The Connector sends the selected field types in the content item and your notes to the translation provider as a correction request.

The summary page of the wizard opens.



It displays the translation language pair and the field types for which you requested a translation correction.

9. Click **Finish**.

The wizard closes.

---

## 8.4 Updating a Remote Translation Memory (TM)

After the Connector returns the translated content from your translation provider to Sitecore, in-country marketers or reviewers can review the translation, as described in "[Reviewing Translated Content](#)" on page 90. These reviewers can then send their post-translation updates to their translation technology or provider, who can then update the translation memory (TM) with these content updates. This means that the updates will be available to the translation provider for subsequent translations, which makes the translation process more efficient. Your translation provider's TM (translation memory) server is a *remote TM*.

Your changes will be copied to the `UpdateTM` folder that resides on your translation provider's FTP server.

**Note:** This feature is available only with the Clay Tablet FTP Connector. The location of the remote TM server is specified by the `TNS_UpdateTMFolder` setting in the FTP configuration file, which is configured by CTT.

To send updates to the translation provider's translation memory(TM), you do one of the following:

- You send updates for a single item from the Content Editor, in the **Translation Status** tab for the item, as described in "Updating a Remote TM for a Single Item" on page 101.

**Note:** When you send updated content from a single item to update a remote TM, you can specify which field types to send.

- You send updates for multiple items in a single translation job from the Connector's **Translation Status** window, as described in "Updating a Remote TM for Multiple Items" on page 103.

The Connector sends an XML file to the translation technology or provider with the updates. This file includes:

- the original source content
- the original translated content
- the updated translated content

### Best practices for updating a remote translation memory (TM):

- Make only small post-translation updates in the Sitecore authoring environment, and then use this feature to send those updates to the translation provider. If you require large updates or rewrites, discuss this directly with your translation provider to ensure that all changes are captured efficiently. In this scenario, the translation provider can redo the translations and redeliver the updates via the Connector.
- Create a primary review process for translation that captures most changes to translated content, so that the translation provider can update its TM directly. The secondary review process in Sitecore then captures only small and minor post-translation updates.
- A project manager at the translation provider should review the suggested updates and ensure that the translation memory is updated with these changes.

**Important:** Updating the remote TM is not an automatic process. The translation provider must review all the changes and transform them into a format to update the TM. The translation provider may charge a service fee for this work.

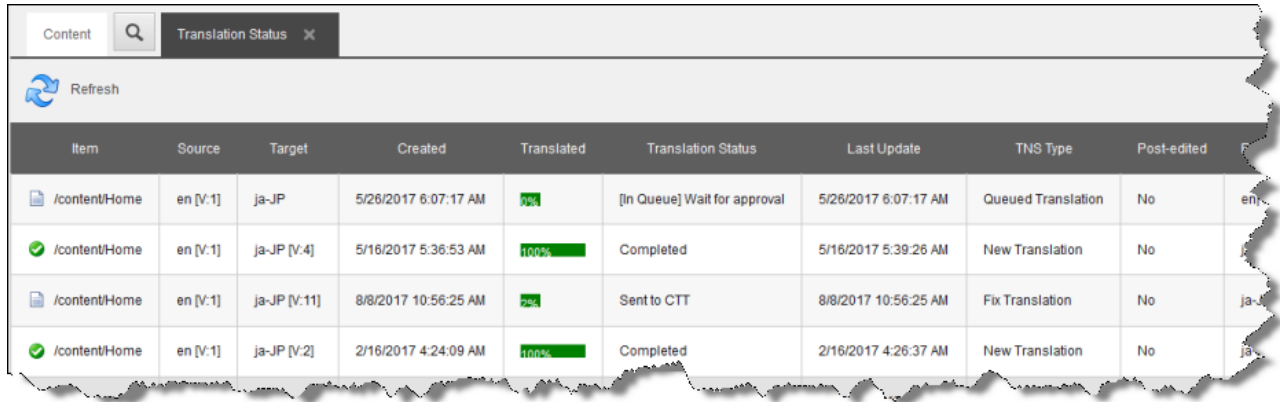
### 8.4.1 Updating a Remote TM for a Single Item

You can update a remote TM server for a single item, as described below. For instructions on updating a remote TM server for multiple items from a single translation job, see page 103. For general information about updating a remote TM server, see page 100.

1. In the **Sitecore Content Editor**, navigate to the content item for which you want to send updated translation content to a remote TM.
2. In the Sitecore Content Editor ribbon, click the **CTC Translation** tab.
3. In the **Translation Tools** section, click **Item Translation Details**.



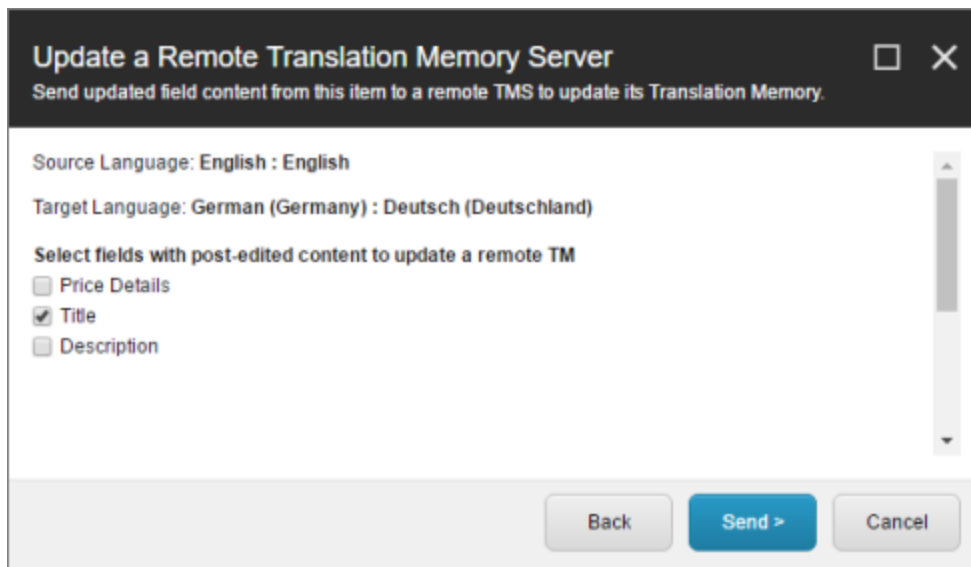
The **Translation Status** tab for the content item opens.



This tab displays translation-status information about the selected content item and any child items. For a detailed description of this tab, see "[Monitoring Status for a Single Item](#)" on page 74.

4. Select an item that meets the following criteria:
  - It has already been translated, so it has **Completed** status.
  - Its translation is backed up in the database, so the value in the **TNS Backup** column is **Yes**.
5. Right-click, and select **Send Post-Edited Content to Update a Remote TM** from the context menu.

The **Update a Remote Translation Memory Server** page of the wizard opens.

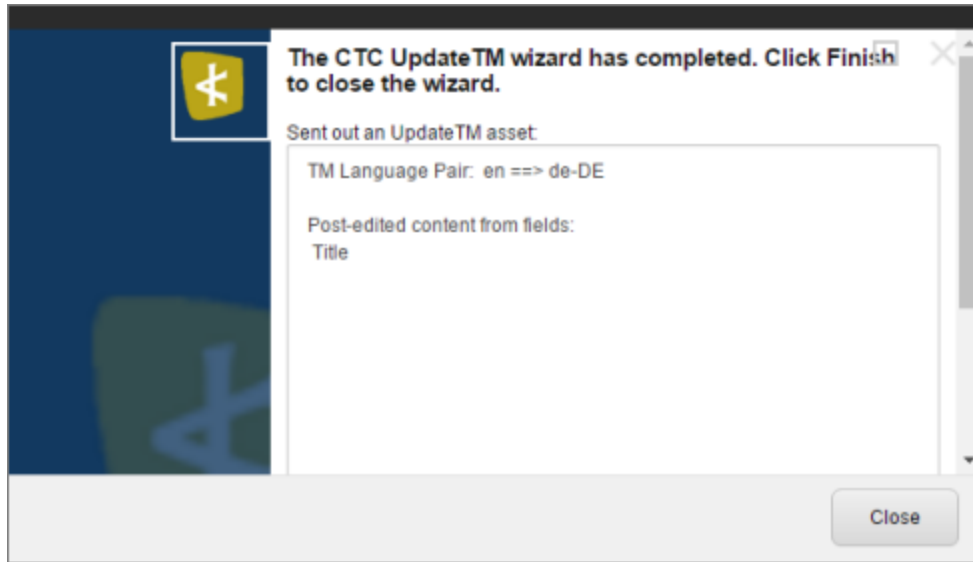


6. The source and target languages are displayed. The main section displays a list of all field types in the content item. Select the check boxes for the field types that you want to send to the remote TM server.

7. Click **Send**.

The Connector sends the content from the selected field types to the remote TM server.

The summary page of the wizard opens.



It displays the translation language pair and the field types for which the Connector sends content to the remote TM server.

8. Click **Finish**.

The wizard closes.

## 8.4.2 Updating a Remote TM for Multiple Items

You can update a remote TM server for multiple items from a single translation job, as described below. For instructions on updating a remote TM server for a single item, see page [101](#). For general information about updating a remote TM server, see page [100](#).

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

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



- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Translation Status** from the menu. (Sitecore 6 and 7 only)

The **Translation Status** window opens, displaying the translation status of all content items that you submitted.

Item Path	Language	Version	Type	Provider Ref	Status	Percent	ETA	Update
/content/Home	sa-IN	3	New Translation	ba827299-8934-43a4-af08-dac59d02e481	Sent to LSP	52%		01/17/17
/content/Home	ja-JP	5	New Translation	4de564fa-c4c6-4ce9-b795-65c21bb17329	Sent to LSP	52%		01/17/17
/content/Home/About-Us/Our-History	fr-FR	1	New Translation	deb3106-a37b-4e81-a47a-eed87613b01e	Completed	100%		01/17/17
/content/Home/About-Us/Our-History	ja-JP	3	New Translation	b978d4ba-7279-4cbe-b177-3f580188ec5a	Completed	100%		01/18/17
/content/Home/About-Us	fr-FR	3	New Translation	0b7c0ebd-1cc8-47d6-a77a-7d3a8349ae87	Completed	100%		01/18/17
/content/Home/About-Us/Our-History	sa-IN	1	New Translation	b2a30376-4a13-424a-ac1a-99846326a736	Completed	100%		01/18/17
/content/Home/About-Us	sa-IN	1	New Translation	b2a30376-4a13-424a-ac1a-99846326a736	Completed	100%		01/18/17
/content/Home/About-Us/Our-History	fr-FR	5	New Translation	0b7c0ebd-1cc8-47d6-a77a-7d3a8349ae87	Completed	100%		01/18/17
/content/Home/About-Us	ja-JP	3	New Translation	b978d4ba-7279-4cbe-b177-3f580188ec5a	Completed	100%		01/18/17
/content/Home/About-Us/Our-Values	fr-FR	7	New Translation	0b7c0ebd-1cc8-47d6-a77a-7d3a8349ae87	Completed	100%		01/18/17
/content/Home/About-Us/Our-Values	ja-JP	3	New Translation	b978d4ba-7279-4cbe-b177-3f580188ec5a	Completed	100%		01/18/17
/content/Home/About-Us/Our-Values	sa-IN	1	New Translation	b2a30376-4a13-424a-ac1a-99846326a736	Completed	100%		01/18/17
/content/Home	fr-FR	3	New Translation	ced9a0f6-9e68-452d-a18c-933ca01b5f3a	Completed	100%		01/17/17
/content/Home	sa-IN	4	New Translation	87c01f6a-c908-41bb-9e9a-f834fd29b5cf	Sent to LSP	52%		01/17/17

For detailed information about the Translation Status window, see "[Monitoring Status for Multiple Items](#)" on page 71.

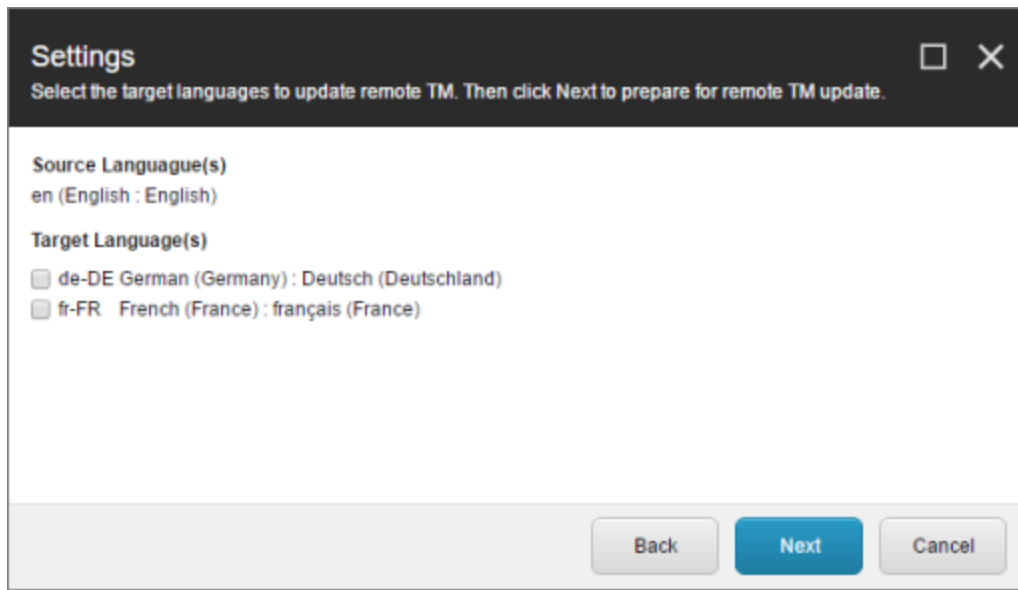
- Select the job from with the items to send to the remote TM server from the **Job** dropdown list.
- Select the items to send to the remote TM server.

**Tips:** Use the **Shift** key to select a range of adjacent items. Use the **Ctrl** key to select multiple non-adjacent items.

- Click **Update Remote TM**.

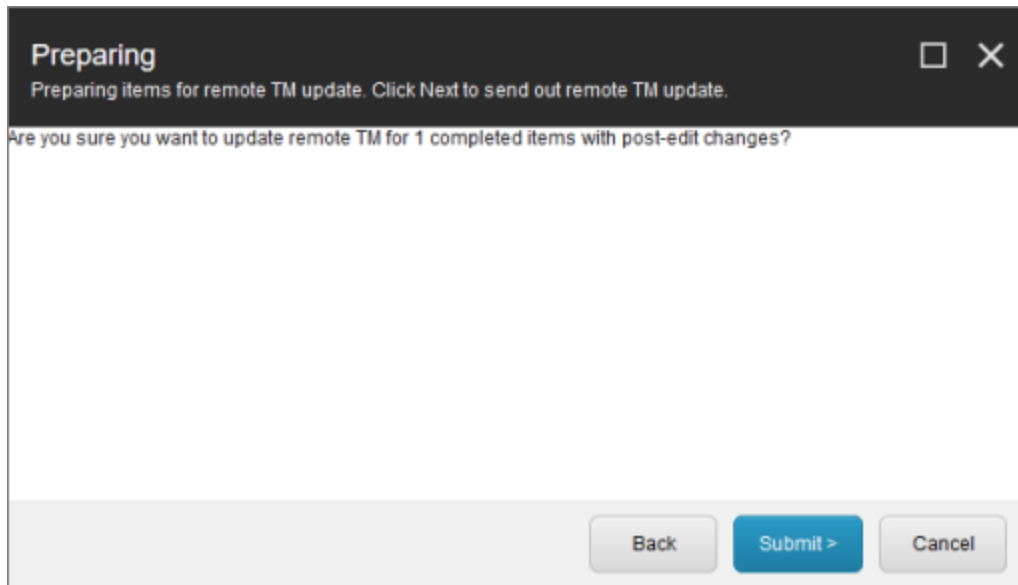
The **Settings** page of the wizard opens.





5. The source and target languages are displayed. Select the check boxes for the target languages that you want to send to the remote TM server, and click **Next**.

The **Preparing** page of the wizard opens.



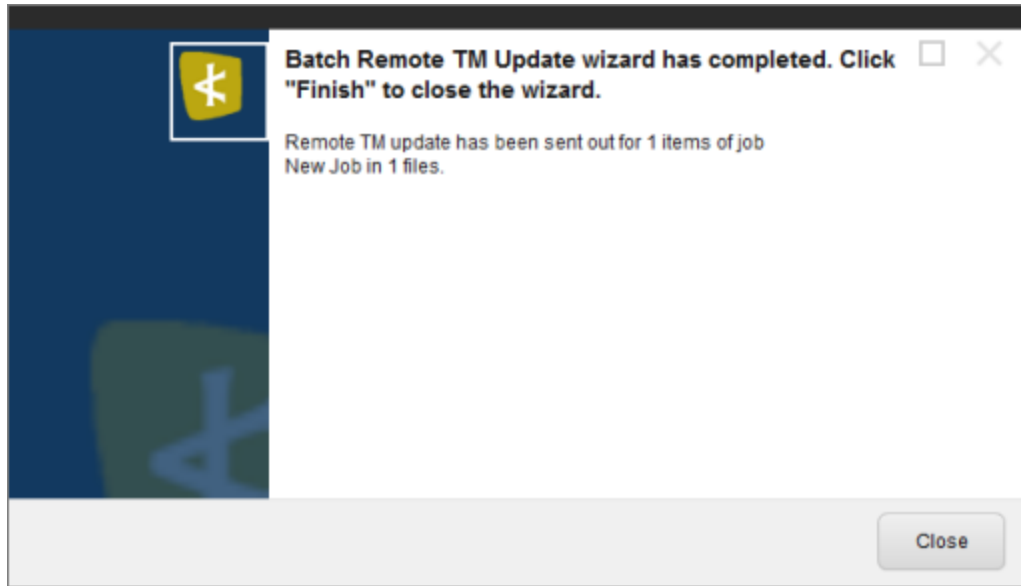
This page displays the number of items to send to the remote TM for updating.

**Notes:** If there are items in the job that have not been translated yet, a message displays this. If there are no items that have been modified after translation, a message states: There is no item with post-edit changes that require TM update.

6. Click **Submit**.

The Connector sends the content from the selected items to the remote TM server.

The summary page of the wizard opens.



It displays the number of pages and the translation job name that the Connector sent to the remote TM server.

#### 7. Click **Finish**.

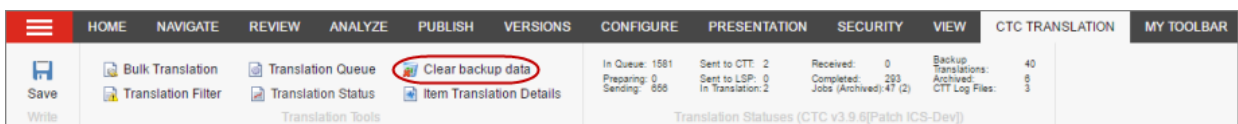
The wizard closes.

## 8.5 Clearing Backup Data

You can delete all the backup data used by the following Connector translation features: Translation Correction, Update Remote TM, and SyncTranslation. You can delete the backup data from either the Sitecore Content Editor or the Sitecore Desktop.

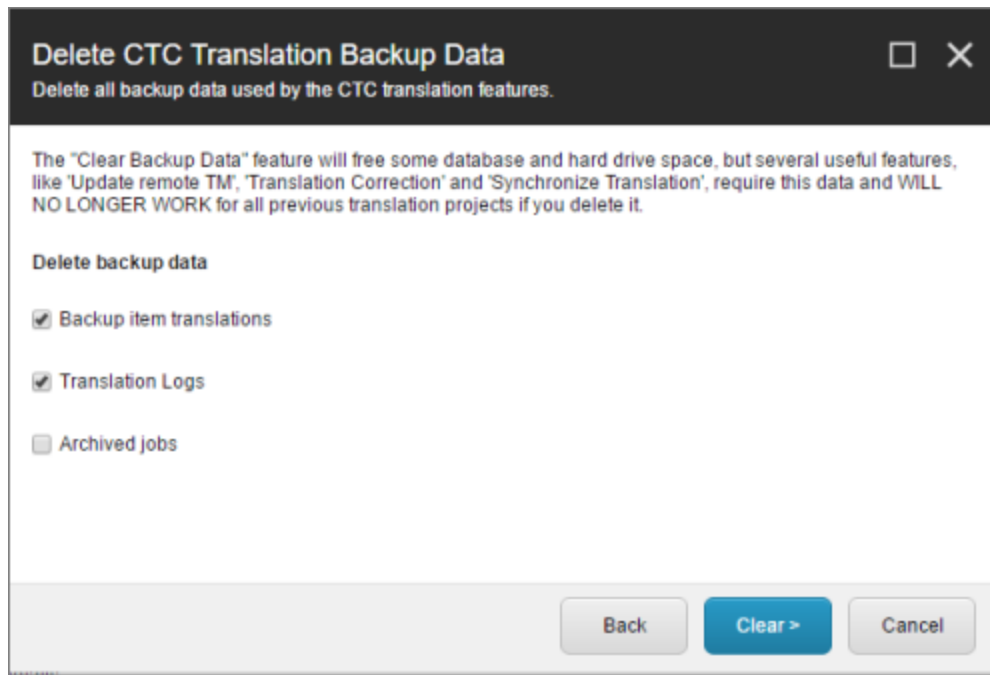
#### 1. Do one of the following to open the Translation Data Cleanup wizard:

- In the **Sitecore Content Editor** ribbon, click the **CTC Translation** tab, and then in the **Translation Tools** section, click **Clear Backup Data**.



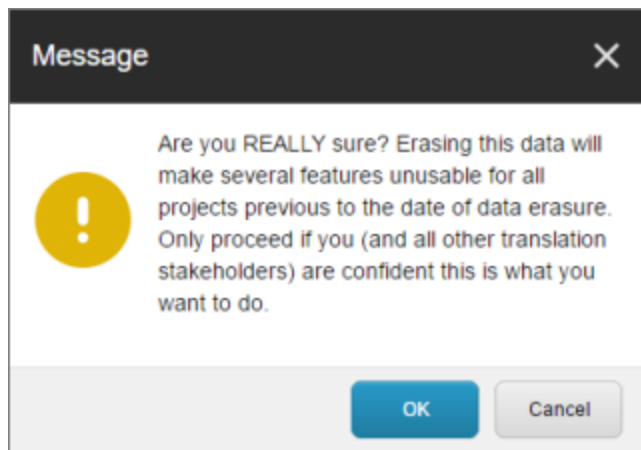
- In the **Sitecore Desktop**, click the **Sitecore** menu, and then select **All Applications > CTC Translation > Clear Backup Data** from the menu. (Sitecore 6 and 7 only)

The **Delete CTC Translation Backup Data** page of the wizard opens.



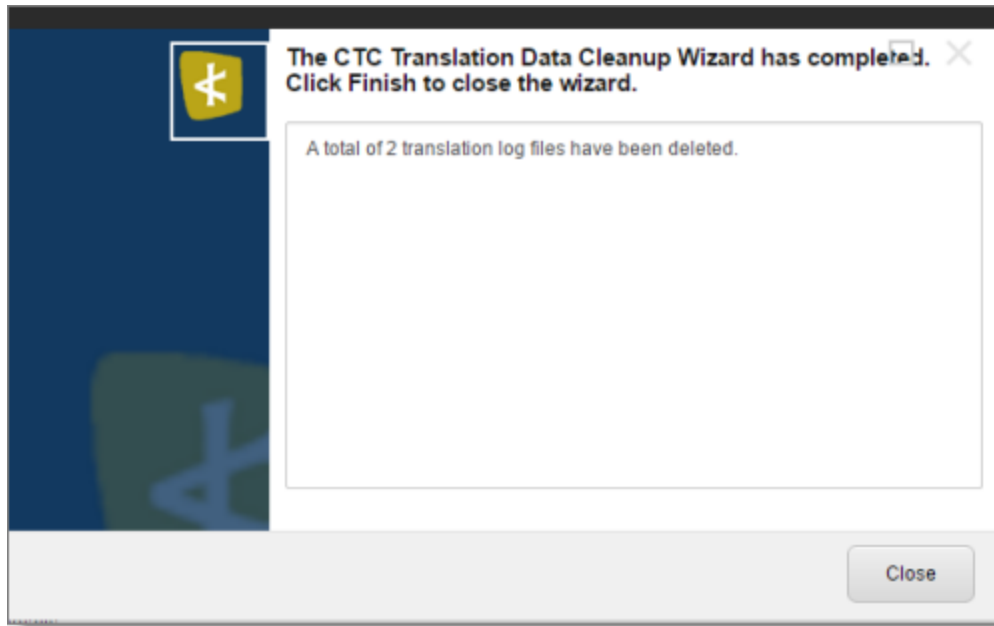
2. Select the types of backup data to delete:
  - **Backup item translations:** Individual content item translations at the field level.
  - **Translation logs:** Log files of all the events that occurred in a translation job.
  - **Archived jobs:** Data in archived jobs.
3. Click **Clear**.

A warning message box opens.



4. If you are sure you want to delete the backup data, click **OK**.

The summary page of the wizard opens, displaying the number of each type of backup file you deleted.



5. Click **Finish** to close the wizard.

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