



Integration for Salesforce Knowledge

Install and Setup Guide
(SDL Mantra/TMS, SDL WorldServer)

April 2020



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Version History

Version	Date	Approved	Notes
1.1	December 2016	Nigel Watson	First version supporting SDL TMS and SDL Managed Translation
1.18	September 2017	Nigel Watson	Second version adding support for SDL WorldServer
1.24	December 2018	Nigel Watson	New version to support Lightning
1.25	September 2019	Nigel Watson	Feature enhancements
1.26	May 2020	Nigel Watson	Feature enhancements

Introduction

Expand your global reach

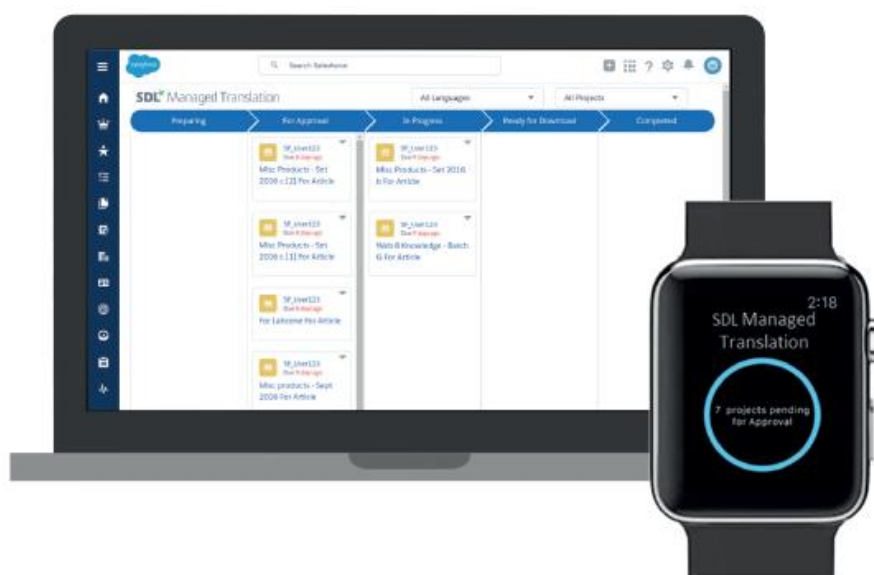
A huge volume of valuable content is stored and used within your company's instance of Salesforce Knowledge. Where this content is translated today, the process is very manual and fragmented, with individual users extracting content and sending to third party agencies for translation, before being imported back into Salesforce.

The SDL Integration for Salesforce Knowledge app allows users to easily send that content for translation, approve costs and track progress without having to leave the Salesforce platform. Users can now deliver high quality translations in their local markets on a global scale.

How it works

The SDL app is embedded directly within your Salesforce platform and allows users to select and send Knowledge Articles and Document Attachments from Salesforce to SDL for translation via SDL Managed Translation/SDL TMS or SDL WorldServer. An easy-to-use admin interface will allow the user to specify which fields are translatable for multiple types of Knowledge Article records. Translated content is automatically returned into Salesforce as new localized records and documents.

Users granted permissions by the app admin will be able to manage the full translation lifecycle right from the Salesforce UI, no need to open a second app. You'll be able to see and approve the cost of the translation project, track progress and download translations all from within the App on the Salesforce platform they are familiar with.



Salesforce Knowledge Setup

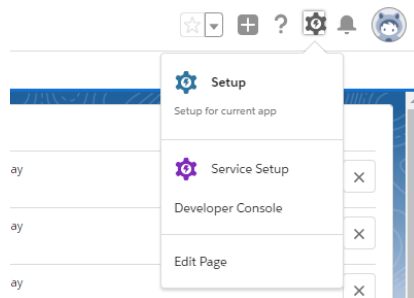
SDL Language Technology

The SDL app supports connection to both SDL Managed Translation/SDLTMS and SDL WorldServer. It is important to ensure the SDL technology is setup and you have the necessary login credentials before proceeding further with the installation. Instructions and notes for setup of these systems is detailed later on in this user guide.

Permissions

You will need to have System Admin rights to the Salesforce Org to which you want to install the SDL app.

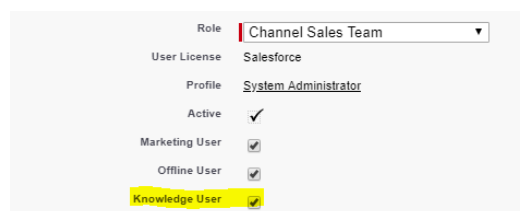
Go to the **Setup** page



User Setup

Users who are going to use article management page, need permissions called Knowledge user

1. Go to **Administration**
2. Select **Users > Users**
3. Ensure roles are setup with the **Knowledge User** permission
4. Users are licensed concurrently via Salesforce

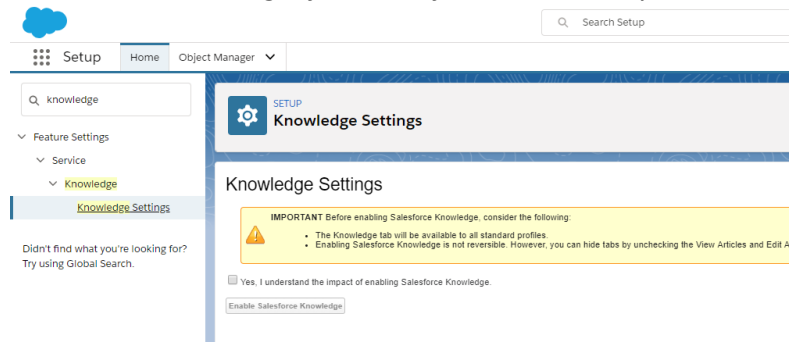


Knowledge setup

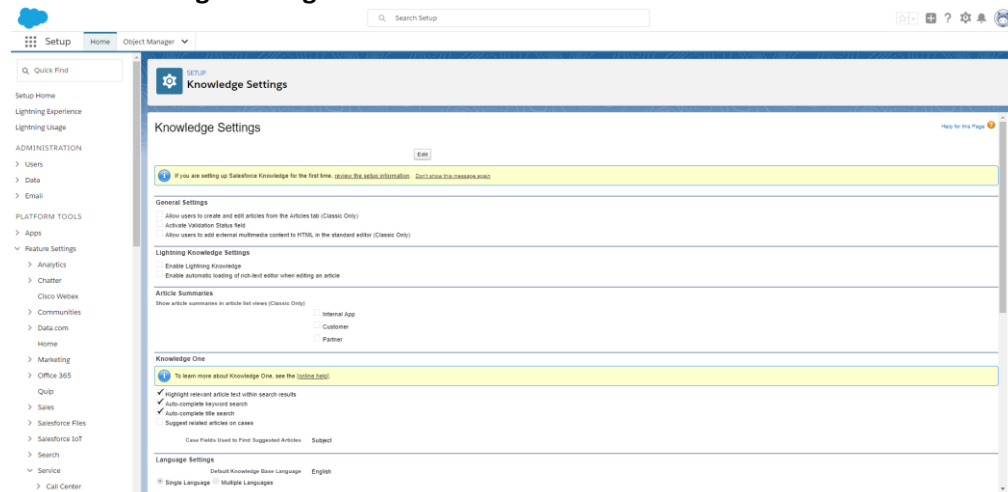
Enable Knowledge Settings

1. You will need to enable Knowledge for your Salesforce org.

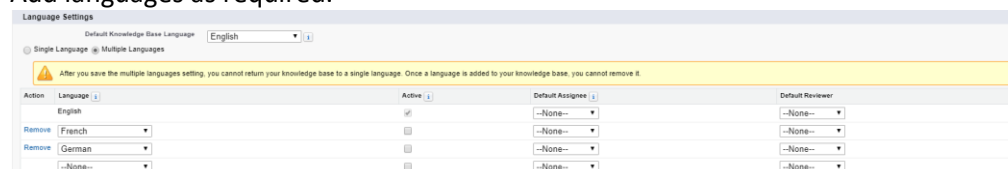
Note: read the messages from Salesforce and ensure you have the rights to do this setup.



1. Select **Knowledge Settings**



1. Select **Edit**
2. Select **Enable Lightning Knowledge**
3. Under Language Settings, select **Multiple Languages**
4. Add languages as required.



5. Set **Active**
6. Select **Save**

Note: Default Reviewer can be left blank as language review is performed in the SDL translation workflow. However if you choose to use the Salesforce Review functionality, you can choose a reviewer here who will review in-situ in Salesforce.

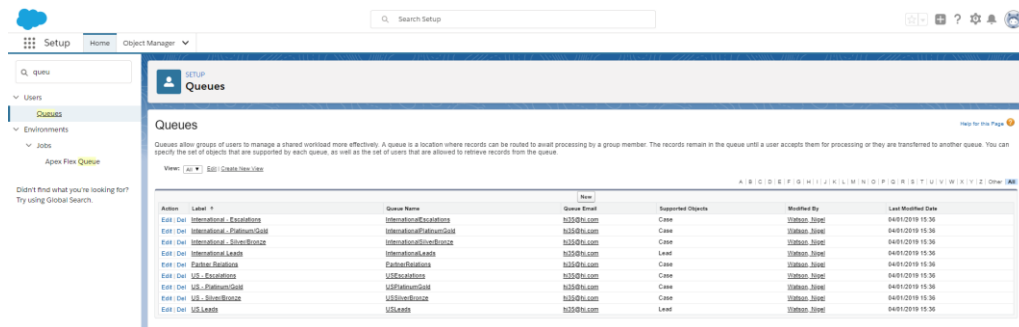
Translation Queues

Create a Translation Queue

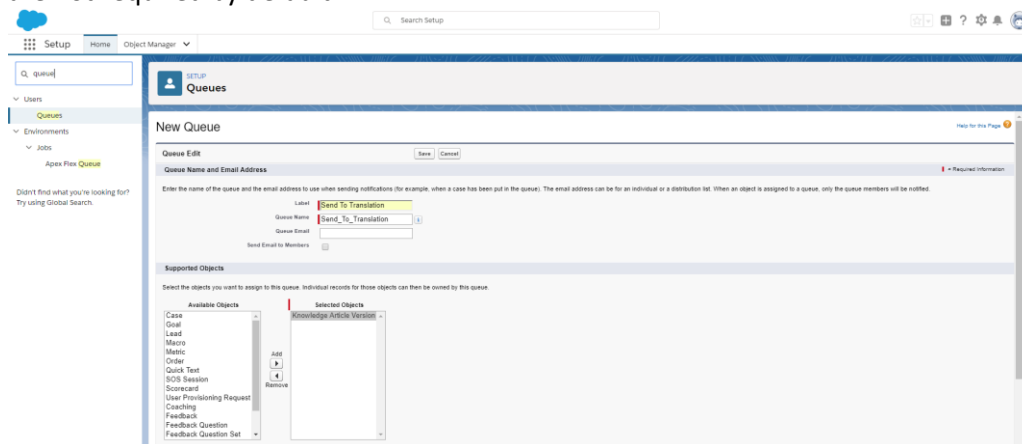
The SDL App uses Queues to move Articles between the 2 to indicate status. Create two translation queues, one to “Send to Translation” and one for “In Translation”. These will be used in the SDL App setup later on.

In the Salesforce settings area, search for Queues

1. Under **Users**, click **Queues**
2. Select **New**

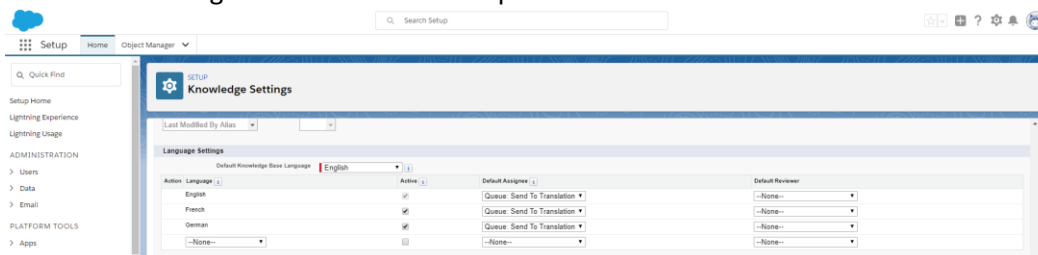


3. Create a **Label** and **Name** for your Translation Queue
4. It is critical to select **Knowledge Article Version** as the Supported Object. The other options are not required by default.



Once completed you can return to the Knowledge Settings page and assign the Translation Queue as default for Articles which will make it simpler for the users selecting translations.

1. Set Default Assignee to the translation queue create



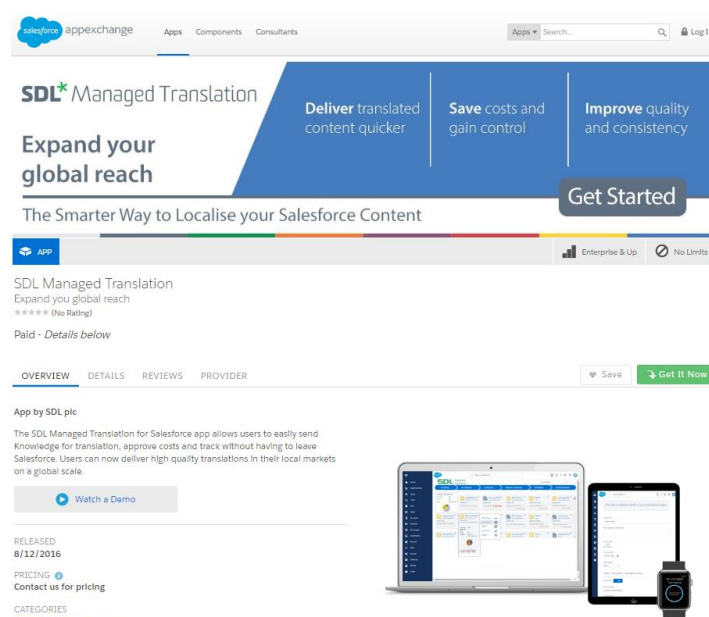
Install and Configure SDL App

Installation

The SDL app is called “**SDL Managed Translation**” and is a managed package in Salesforce. To install you need to locate the app in the Salesforce AppExchange and hit [Get it now], this will guide you through the process to install into your Salesforce cloud. This can be your Dev or Sandbox server or your Production server.

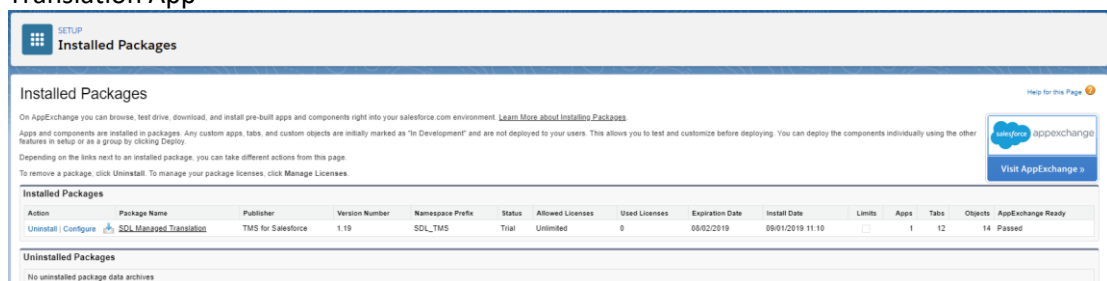
If installing into Production, inform SDL so we can lift the 30 day default expiry on the license.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DqpbTUAR>



Once installed, you should Configure the app to complete the installation.

1. Navigate to Installed Packages and click the Configure button next to the SDL Managed Translation App

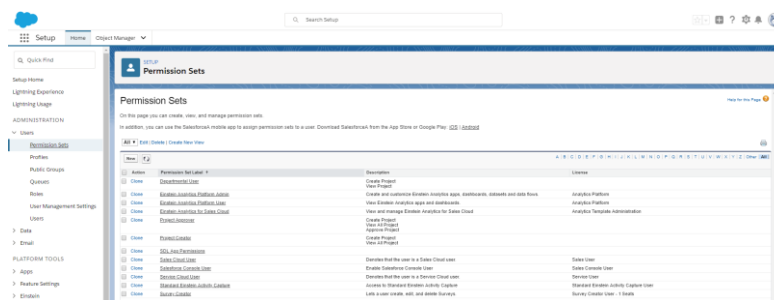


Note: the app itself is called **SDL Managed Translation**. But once installed, the UI for the app in Salesforce is called **SDL Translation**.

Permission Sets.

Add users to the **Salesforce Permission Sets** noted at the end of the Settings page.

1. If users are selected during the App installation, Salesforce takes care of giving all the object permissions associated with the App (Departmental User and Project Creator) and admins do not need to do anything other than assigning Project Approver rights if required.
2. If the App is already installed in an org and a new user requires App permission, this needs to be done manually at object level. This can be very time-consuming, so SDL packaged a permission set called SDL App Permissions that bundles all the object permissions required to use the App.
 - Departmental User
 - In the app can Create Project and View Projects
 - Project Creator
 - In the app can Create Project and View All Projects (Default)
 - Project Approver
 - In the app can Create Project, View All Projects and Approve Projects
 - SDL App Permissions
 - Can view the app tabs, and in the app can Create Project and View All Projects



Scheduled Jobs

There are 4 scheduled jobs running in Salesforce. These jobs wake up at intervals set in the Basic settings, the intervals are hourly.

- TMSProjectSync checks for the status of the translation projects
- TMSTranslationTracker downloads projects at the ForDownload status

Scheduled jobs in Salesforce are known to stop running, so SDL create two two additional jobs:

- CheckProjectSync checks if TMSProjectSync Is running, if not, it schedules it for running
- CheckAutoDownload Checks if TMSTranslationTracker Is running, if not, it schedules it for running

If the jobs are running and in progress the, CheckProjectSync and CheckAutoDownload goes back to sleep with no action performed and wakes up at the next interval.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	CheckAutoDownload	Dev1_Bot	30/09/2019 15:51		30/09/2019 20:00	Scheduled Apex
Del	CheckProjectSync	Dev1_Bot	30/09/2019 15:51		30/09/2019 16:00	Scheduled Apex
Del	TMSProjectSync	Dev1_Bot	30/09/2019 15:44	30/09/2019 15:48		Scheduled Apex
Del	TMSTranslationTracker	Dev1_Bot	30/09/2019 15:45	30/09/2019 15:50		Scheduled Apex

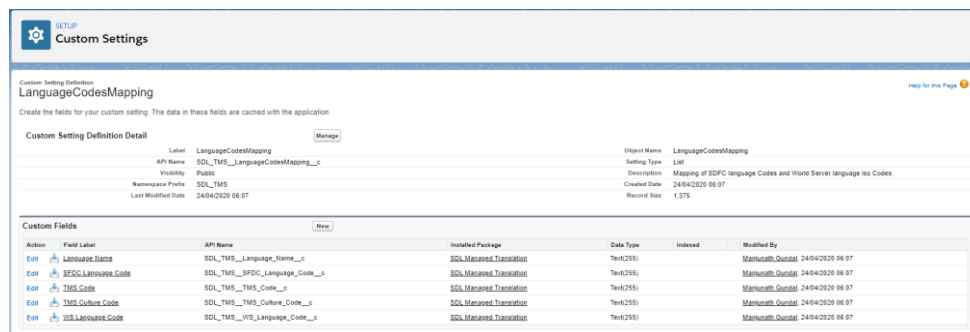
Language Mapping Table

The SDL App uses a language mapping table to map Salesforce language codes to the language codes used by the SDL technology platforms. SDL Mantra/TMS and SDL WorldServer all use different language codes.

The language mapping table is installed by default with the SDL App and is auto-populated with the language codes when the app settings are first entered and the app synchronizes with the SDL language technology. This process happens in the background during save settings step.

The language mapping table can be found by:

1. Goto **Setup**.
2. Search for **Custom settings**
3. Click on **LanguagescodesMapping**



Custom Settings

Custom Setting Definition
LanguageCodesMapping

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

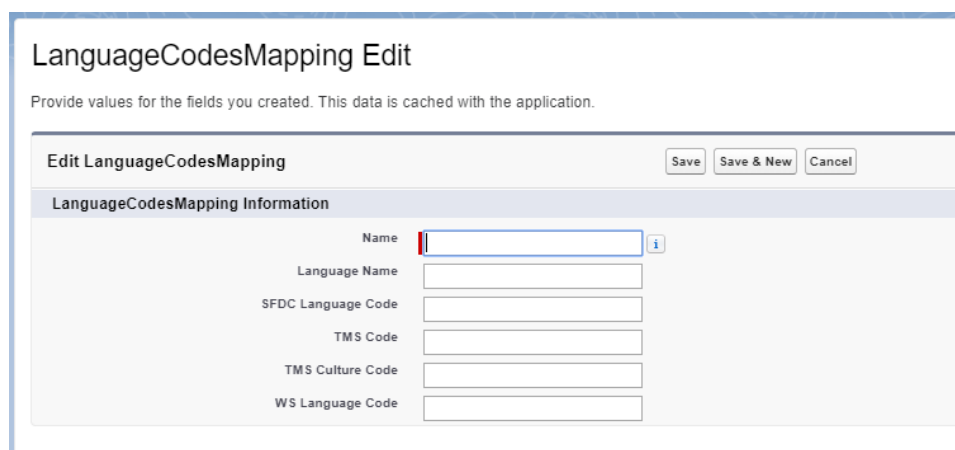
Label	API Name	Object Name
LanguageCodesMapping	SDL_TMS__LanguageCodesMapping__c	LanguageCodesMapping
Visibility	Public	Setting Type
Namespace Prefix	SDL_TMS	Description
Last Modified Date	24/04/2020 08:07	Created Date
		Record Size

Custom Fields

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	Language Name	SDL_TMS__Language_Name__c	SDL Managed Translation	Text(255)		ManuMath_Gupta: 24/04/2020 08:07
Edit	SFDC Language Code	SDL_TMS__SFDC_Language_Code__c	SDL Managed Translation	Text(255)		ManuMath_Gupta: 24/04/2020 08:07
Edit	TMS Code	SDL_TMS__TMS_Code__c	SDL Managed Translation	Text(255)		ManuMath_Gupta: 24/04/2020 08:07
Edit	TMS Culture Code	SDL_TMS__TMS_Culture_Code__c	SDL Managed Translation	Text(255)		ManuMath_Gupta: 24/04/2020 08:07
Edit	WS Language Code	SDL_TMS__WS_Language_Code__c	SDL Managed Translation	Text(255)		ManuMath_Gupta: 24/04/2020 08:07

To create a new language code, for example if you have a new custom code setup in SDL

1. Click on **Manage**
2. Click on **New**
3. Complete the necessary fields depending on your SDL Language Technology



LanguageCodesMapping Edit

Provide values for the fields you created. This data is cached with the application.

Edit LanguageCodesMapping Save Save & New Cancel

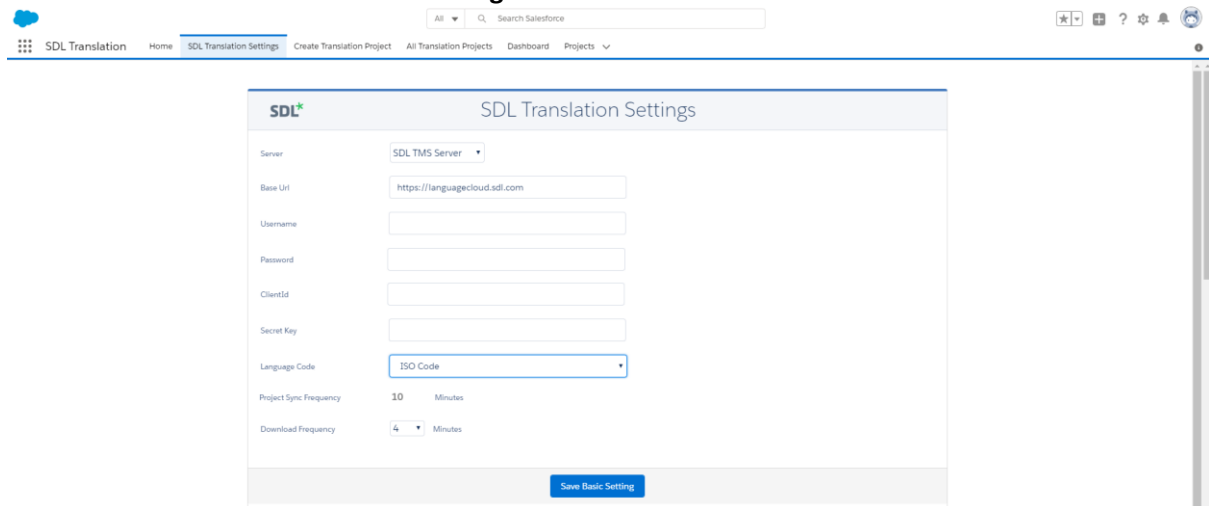
LanguageCodesMapping Information

Name	
Language Name	
SFDC Language Code	
TMS Code	
TMS Culture Code	
WS Language Code	

Setup – Basic Settings

You'll need admin permissions to access the setup screens in Salesforce

1. Navigate to the **SDL Translation** app
2. Go to the **SDL Translation Settings** tab



3. Choose the server you are connecting to, **SDL TMS** or **SDL Worldserver**
4. Enter the credentials required depending on the server.
 - a. For SDL TMS and SDL Managed Translation, enter **URL**, **Username**, **Password**, **Client ID** and **Secret** provided to you by the SDL Admin. Set the Language code to **ISO Code**.
 - b. For SDL WorldServer, enter **URL**, **Username**, **Password** and set the Client ID from WorldServer.
5. The **Project Sync Frequency** is automatically set to 10 minutes
6. Set the **Download Frequency**, this is in hours and the recommended value is 1 hour. This is the frequency at which the app checks SDL server for translated articles and downloads them.

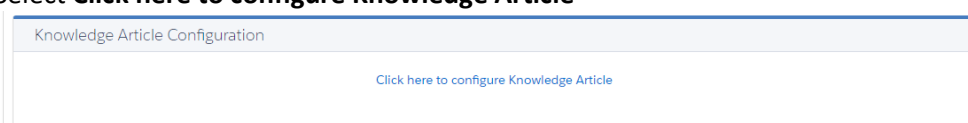
Page layouts and Notes Configuration are not required for a standard setup

Setup - Knowledge Article Configuration

Assign the Translation Queue in SDL App

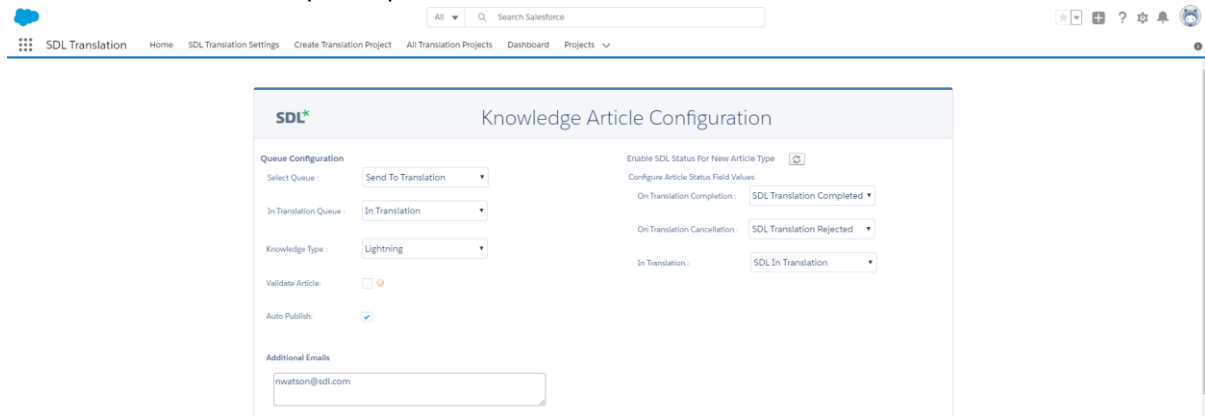
Set the translation queue in the SDL Managed Translation app

1. Go to **SDL Translation Settings**
2. Scroll down to **Knowledge Article Configuration**
3. Select **Click here to configure Knowledge Article**



4. Select the queues you created earlier in **Queue Configuration**
5. Select **Knowledge Type** as Lightning

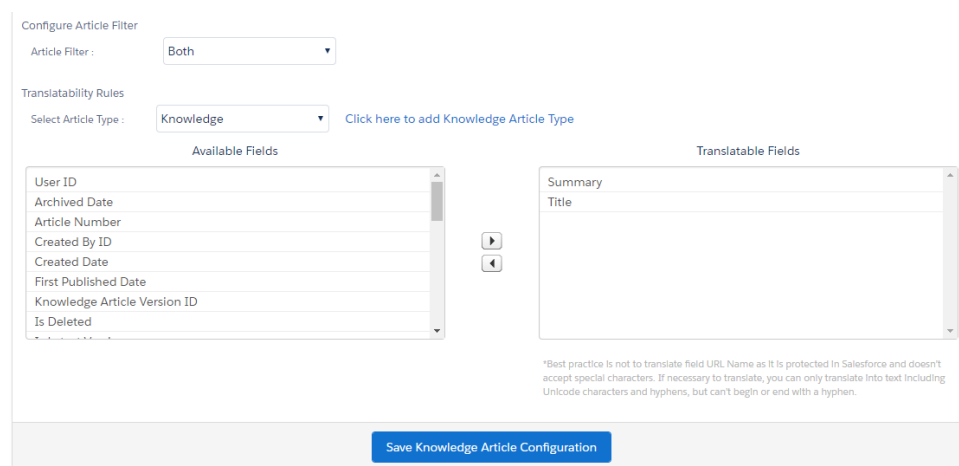
6. **Validate Article** allows an admin to lock down articles that are in the translation process, stopping the User and the SDL App from sending article versions for translation if a previous version is already in progress.
7. **Auto Publish** will trigger the auto-publish workflow when translated articles are uploaded.
8. **Additional Emails** – here you can enter additional support email accounts to receive any errors or messaging from the SDL app.
9. Click the refresh icon on **Enable SDL Status For New Article Type**
 - a. Set the options per the below screenshot



The screenshot shows the 'Knowledge Article Configuration' page. Under 'Queue Configuration', 'Send To Translation' is selected. Under 'Enable SDL Status For New Article Type', 'On Translation Completion' is set to 'SDL Translation Completed', 'On Translation Cancellation' is set to 'SDL Translation Rejected', and 'In Translation' is set to 'SDL In Translation'. 'Validate Article' is unchecked, and 'Auto Publish' is checked. The 'Additional Emails' field contains 'n.watson@sdl.com'.

10. Click **Click here to add Knowledge Article Type**
11. Paste the Article API into the box and click **Add Article**
 - a. Article API is found via a Global Search in settings
 - b. Click **Save**
12. For each Article Type, select the Translatable Fields and add them to the box on the right

Note: Ensure you click **Save** after adding for each Article Type' translatable fields
13. These settings can be made for Draft, Published or both article statuses
14. Note the warning about certain protected fields in Salesforce.



The screenshot shows the 'Configure Article Filter' page. 'Article Filter' is set to 'Both'. Under 'Translatability Rules', 'Select Article Type' is set to 'Knowledge'. The 'Available Fields' list includes: User ID, Archived Date, Article Number, Created By ID, Created Date, First Published Date, Knowledge Article Version ID, and Is Deleted. The 'Translatable Fields' list includes: Summary and Title. A warning note at the bottom states: 'Best practice is not to translate field URL Name as it is protected in Salesforce and doesn't accept special characters. If necessary to translate, you can only translate into text including Unicode characters and hyphens, but can't begin or end with a hyphen.' A 'Save Knowledge Article Configuration' button is at the bottom.

15. Click **Save Knowledge Article Configuration**

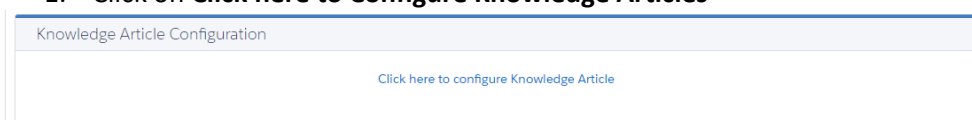
Setup – Automated Project Configuration

The SDL App supports the option for automatic project creation, removing the manual steps required to create a translation project and send to SDL as described in the previous section.

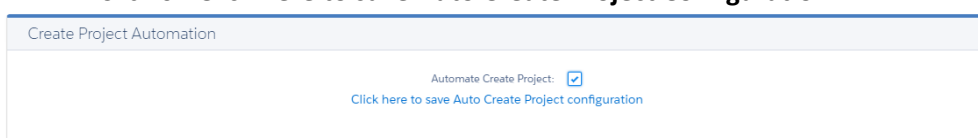
Create Project Automation

Navigate to SDL Managed Translations Settings page

1. Click on **Click here to Configure Knowledge Articles**



2. In the next page scroll down to **Create Project Automation** section
3. Check the **Automate create project** checkbox
4. Click on **Click here to save Auto Create Project Configuration**



Create Project Automation Configuration

Complete the configuration screen with the details:

1. Update the **Project Name** field to a generic name that will be used to name the projects created automatically. This will be appended with the article number for uniqueness.
2. Select the **frequency** at which articles should be collected from the queue and a project created in SDL. There are options for minutes and hourly settings.
3. Select the **project options** and **source** and **target languages**. The configuration ensures that projects are created automatically for the selected target languages only.
 - a. Depending on the SDL Project Option settings, additional attribute fields may be available to set. This provides further customization in the SDL workflows.
4. Select the **queue** from which the articles should be picked up.
5. Select the **queue** to which the downloaded translated articles should be assigned to. If this is not done, the downloaded articles from automation gets assigned to the user who initiates the batch.
6. Click **Save Project Configuration**.

Note: Uncheck the Automate create project checkbox in step 1 in order to stop automation project creation.

Note: Ensure queues selected for Creating project from user Interface and the queue selected for Create project automation are different for clarity and clear separation of articles.

Automated Project Configuration.



Project Name

Select Frequency (In Hours)

10 min ▾

Project Options

Automated Translation ▾

Select Queue

Translation Automation ▾

Assign downloaded articles to

Translation Automation ▾

Source Language

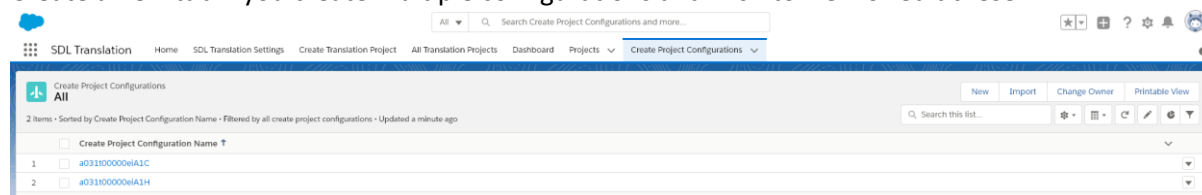
☒ English (United States)

Target Language

☐ German (Germany)
☐ Spanish (Spain, International Sort)
☐ French (France)

☐ Japanese (Japan)
☐ Chinese (Simplified, PRC)

Auto create configurations are stored on a Salesforce object called Create Project Configurations. Create a new tab if you create multiple configurations and wish to view or edit these.



Auto-Publish

For Auto publish the SDL app writes a batch job to publish translated articles.

- If the Master Article is published and sent for translation, once the projects are moved to complete state the batch job executes and publishes the child/translated articles.
- If Master Article is in a Draft state and sent for Translation, once the projects are moved to complete state the Batch job executes and tries to publish the Translated Article. However the master article is in the draft state and it cannot publish the child article as Salesforce won't allow to publish the article if the master article is in the Draft state. In this scenario, the batch job moves the translated article to "Publish in-progress" state. Once the Master article is published the child/translated article will publish automatically.

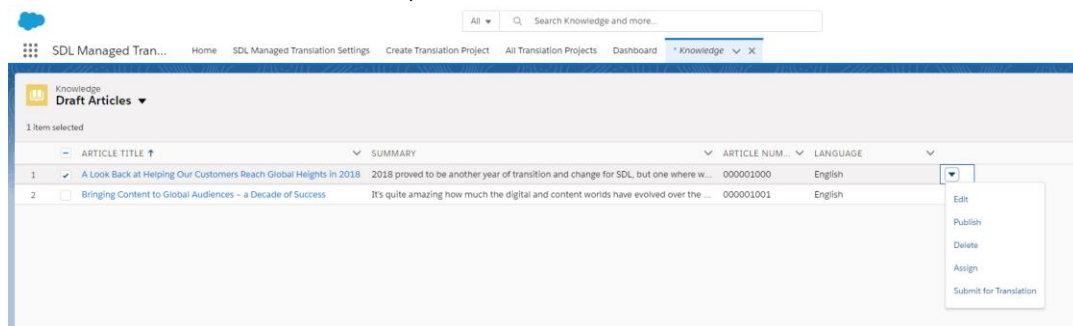
Managing Article Translation

There are two use-cases for creating translation projects:

1. The article author submits articles to a translation queue, and a translation owner creates a translation project to send to SDL to manage the costs for translation. These may be the same person, and gives visibility and control of the translation and publishing process.
2. The article author submits articles to a translation queue and the translation project is automatically created, sent to SDL. This provides a fully automated process from submission to the translation queue to published article, providing a one-touch translation process for the author.

Send Articles to Translation Queue in Salesforce

1. Select **Knowledge** from the App Launcher menu
2. Under **Draft or Published Articles**, select an article

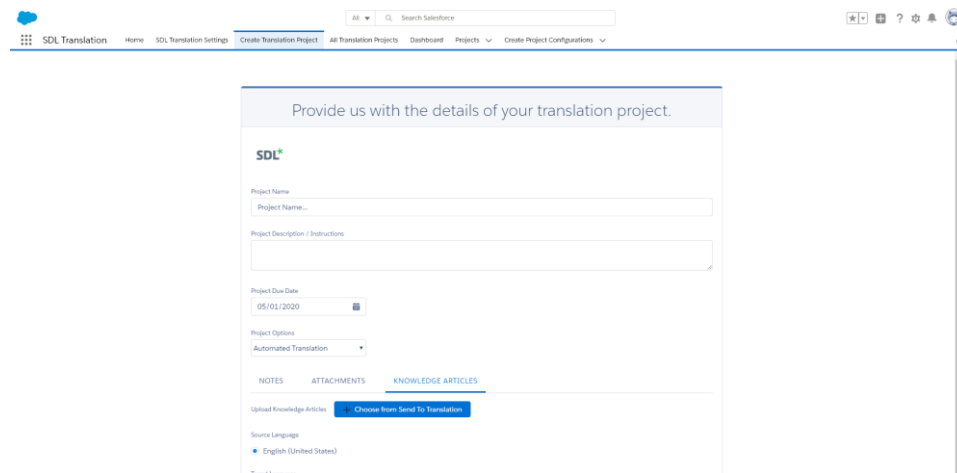


3. Click **Submit for Translation**
4. Choose languages
5. Due dates are Salesforce dates and do not get passed to SDL
6. Choose the translation queue as required – this may be pre-defined by the Salesforce admin, and can be different for each language.

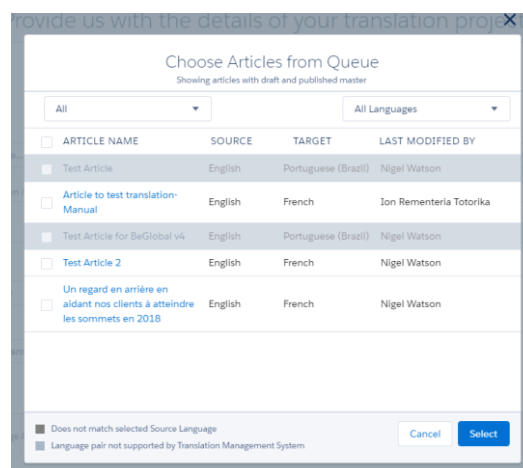
These articles are now in the translation queue in Salesforce. Multiple users can continue to add articles to the translation queue at any time.

Create a Translation Project

Go to the SDL Translation App and select **Create a Translation Project**



1. Enter the translation project details.
Note: The Project name is restricted to 27 characters.
 Ensure all fields are completed as required, including any custom attributes set by your business.
2. Select **Knowledge Articles**
3. Select **Choose from Knowledge for Translation**
Note: This is the name of the Translation Queue created
4. Choose the articles for translation.
Note: Salesforce limits the number of articles in a translation project to 200. If you are working at volume, we would recommend to create single language projects to avoid breaking this limit.



ARTICLE NAME	SOURCE	TARGET	LAST MODIFIED BY
☐ Test Article	English	Portuguese (Brazil)	Nigel Watson
☐ Article to test translation Manual	English	French	Ion Rementeria Totorika
☐ Test Article for BeGlobal v4	English	Portuguese (Brazil)	Nigel Watson
☐ Test Article 2	English	French	Nigel Watson
☐ Un regard en arrière en aidant nos clients à atteindre les sommets en 2018	English	French	Nigel Watson

Note: The languages available will depend on the settings on the SDL server. If some languages are not supported, they will be greyed out in this page.

5. Click **Create Translation Project**
6. The user is directed to the **All Translation Projects** page to see the project status, and an email from salesforce will be sent to the project creator once the project is successful. The email will also notify the user if there were any failures in the project creation.

Auto-Create Translation Projects

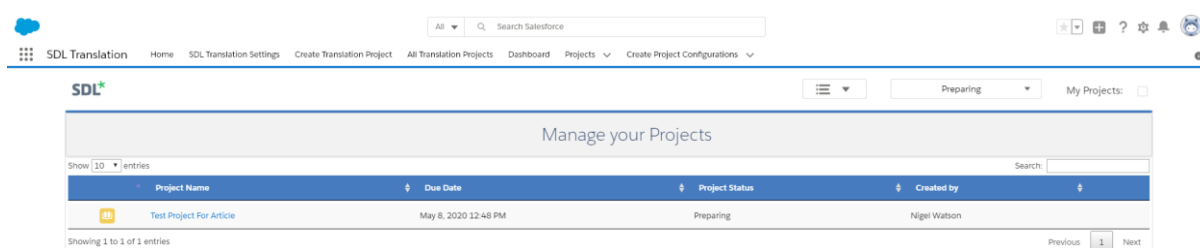
If the auto-create translation project has been configured, the projects will be created automatically based on the schedule set. There is no further input required from the user.

An email from salesforce will be sent to the project creator once the project is successful. The email will also notify the user if there were any failures in the project creation.

Manage Translation Projects

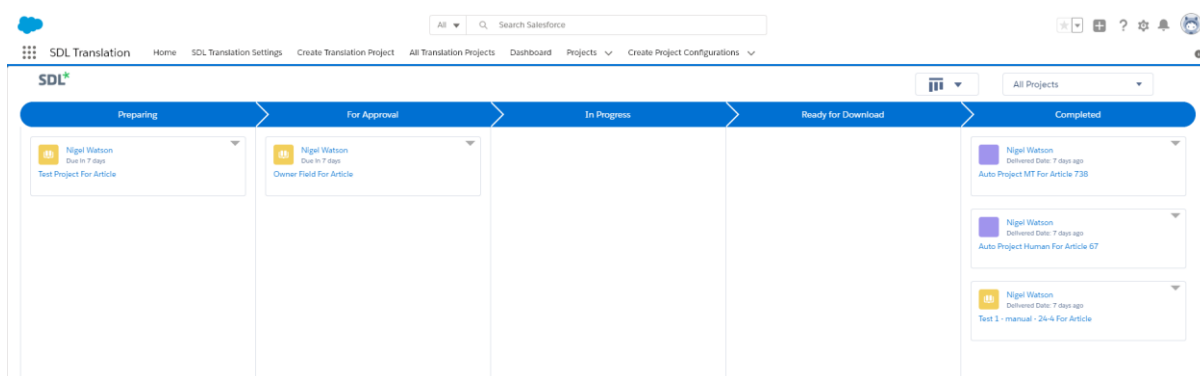
Go to the SDL Translation App and select **All Translation Projects**

The SDL App defaults to the table view and will display projects at the lowest workflow level. If there are no projects in the preparing status, it will default to the Approval status.



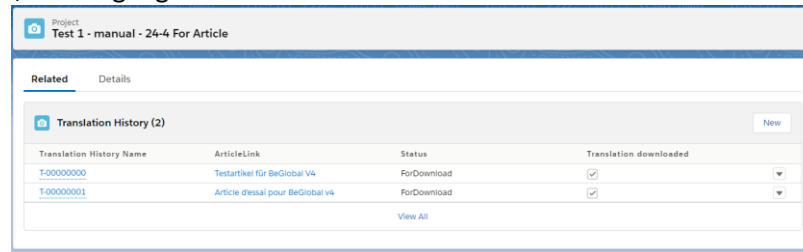
Project Name	Due Date	Project Status	Created by
Test Project For Article	May 8, 2020 12:48 PM	Preparing	Nigel Watson

Depending on the volume of projects you may prefer the Kanban view. From this page a user can view the status of all the translation projects, filter projects, view a summary, details and approve or reject projects.



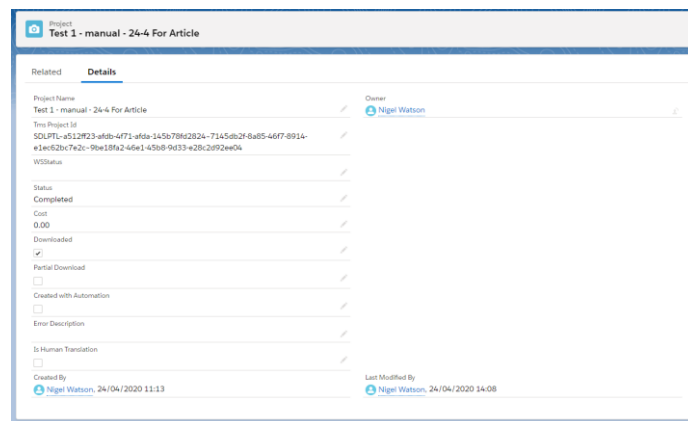
From the project table the user can filter, search and view the status of all projects in the translation process.

1. Click the project name to see more details about the project
2. The Related tab shows information about the articles in the project, their status, and if you click View All, the languages chosen for each.



Translation History Name	ArticleLink	Status	Translation downloaded
T-00000000	Testartikel für BeGlobal V4	ForDownload	☒
T-00000001	Article d'essai pour BeGlobal v4	ForDownload	☒

3. Clicking the Translation History link will provide further details about the specific language version of the article in translation
4. The Details tab shows information about the project, its status and information for how the project was created. The Error Description field will display any errors during translation download

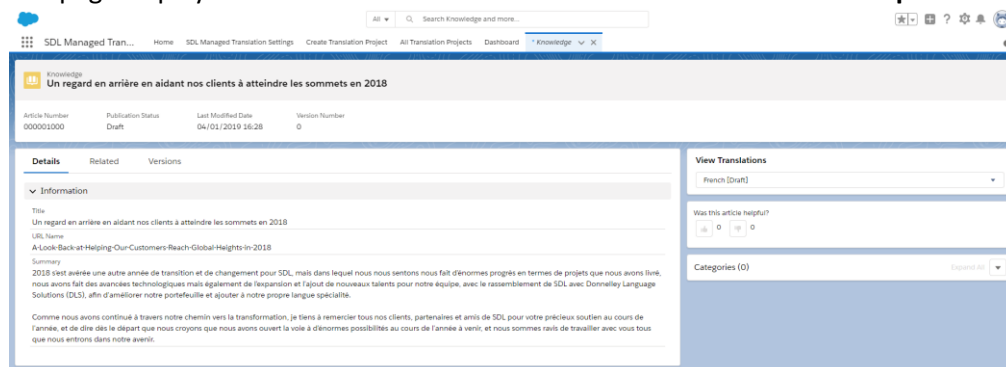


Project Name	Test 1 - manual - 24-4 For Article	Owner	Nigel Watson
Time Project Set	SDLPU-4512823-48b-4f71-af6a-145b789c2824-7145db2f-8a85-46f7-8914-e1e62bc742c-99e18fa2-46e1-43b6-9d33-28b3d92e04		
WSSite			
Status			
Completed			
Cost	0.00		
Downloaded	☒		
Partial Download	☐		
Created with Automation	☐		
Error Description			
Is Human Translation	☐		
Created By	Nigel Watson, 24/04/2020 11:13	Last Modified By	Nigel Watson, 24/04/2020 14:08

View Translated Articles

Once submitted for translation, Salesforce creates a language variant for the article

1. Select the **Article Link** from the translation project Related tab above to view the translated article.
2. The page displays the content of the article as well as the **Translation Completed Date**



Article Number	000001000	Publication Status	Draft	Last Modified Date	04/01/2019 16:28	Version Number	0
----------------	-----------	--------------------	-------	--------------------	------------------	----------------	---

Details
Related
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Title
Un regard en arrière en aidant nos clients à atteindre les sommets en 2018

URL Name
A-look-Back-at-Helping-Our-Customers-Reach-Global-Heights-in-2018

Summary
2018 s'est avérée une autre année de transition et de changement pour SDL, mais dans lequel nous nous sentons nous fait d'énormes progrès en termes de projets que nous avons livrés, nous avons fait des avancées technologiques mais également de l'expansion et l'ajout de nouveaux talents pour notre équipe, avec le rassemblement de SDL avec Donnelley Language Solutions (DLS), afin d'améliorer notre portefeuille et ajouter à notre propre langue spéciale.

Comme nous avons continué à travers notre chemin vers la transformation, je tiens à remercier tous nos clients, partenaires et amis de SDL pour votre précieux soutien au cours de l'année, et de dire de le départ que nous croyons que nous avons ouvert la voie à d'énormes possibilités au cours de l'année à venir, et nous sommes ravis de travailler avec vous tous que nous entrons dans notre avenir.

View Translations
French [Draft]

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0 0

Categories (0)

From here the user has the option to Publish the article if the auto-publish option was not set, this will follow the workflow in Salesforce for publishing.

SDL Mantra/SDL TMS Setup

Preparation

The SDL Connector uses the SDL MantraAPI and requires customizations enabled on the TMS. The SDL Account team will add these customizations to the customer's TMS customizations package and request deployment by SDL Cloud Operations.

There are two URLs for the SDL Connector to use, depending on where your server is hosted:

- US Server: <https://languagecloud.sdl.com>
- UK Server: <https://uk-languagecloud.sdl.com>

Integration Service Account

A service account should be created in SDL Managed Translation for use in authenticating the Connector. This account should only be used by the Connector and not by an end-user to protect against password resets.

Create the User with settings:

- Username: aem-Integration-<CUSTOMER-NAME>
- Password: <<<use a strong, 16 digit password>>>

Create a Group with permissions:

- Language Cloud - Login via SDL Language Cloud, View Cost Information, View API Documentation
- Portal - Create job, Submit job on, View all portal created jobs

Test the credentials: <https://languagecloud.sdl.com/en/managed-translation/login>

- In SDL Managed Translation, go to the Account menu (top right) and select 'Edit User Settings'. Show Completed Projects in my list of projects will display completed projects in the SDL App.

Create SDL Managed Translation App

1. Login to SDL Managed Translation using the Service Account
2. From the user Avatar menu, select **My Applications**
3. Create an AEM Connector App
4. Save the Client ID and Secret

Note: Only access SDL Managed Translation with the above Service Account to test User credentials and create the Connector App.

SDL TMS Configurations

The permissions you give to the Salesforce service user will be inherited by the app, so any Configurations and Attributes which the user can 'see' will also be presented to the users in Salesforce as Project Options to create translation projects against.

Workflows

Once you have your User in place you can create any configurations and workflows you want to be available to the users of the App in Salesforce. Any standard TMS workflow options are ok to use for your Salesforce content.

If you want to check project scope and approve project costs from the Salesforce interface in the SDL Managed Translation app, you'll need to add the **Authorization** stage to the workflow.

The workflow should also have a **Rebuild Translation** and **Translated Content Retrieval** stage to ensure translations are returned to Salesforce at the end of the workflow.

An example workflow is shown below:

Workflow Steps		
Order	Type	Workflow Step
1	⚙️	Start
2	⚙️	Scan
3	⚙️	Pre-processing
4	👤	Authorization
5	👤	Translation
6	⚙️	Rebuild Translation
7	⚙️	Translated Content Retrieval
8	⚙️	Update TM
9	⚙️	Complete Invoice
10	⚙️	Complete

XML content

The SDL Managed Translation produces XML from the records in Salesforce, so the workflow needs to be setup for XML. Please contact SDL for the appropriate XML Options file – this should always be checked and tested to ensure all of the content is appropriately extracted.

Ensure that UTF-8 encoding is enforced for all XML content.

Other content

The app also allows you to send any document attachment for translation. Ensure that any documents you want to be able to process are setup in your configuration, for example Microsoft Word documents.

Attributes

Adding attributes to the configurations will make them dynamically appear in the Create Project screen in the SDL Managed Translation app in Salesforce. Ensure the appropriate descriptions are included so that users understand why they are required. Also ensure the correct behavior is supported in the Attributes such as forced, default options.

SDL WorldServer Setup

SDL WorldServer Preparation

The app uses the WorldServer RestAPI available in version 11.1 and above, therefore older version of SDL WorldServer are not supported.

The URL for the App is: <https://<<CUSTOMER>>.sdlproducts.com/ws-api/v1>

This should be provided along with the service user account details below to the Salesforce Admin setting up the app.

Service User Account

A service account should be created in SDL WorldServer for use in authenticating the App. This account should only be used by the App and not by a human individual to protect against password resets.

An example would be:

Username: **SFCC-Integration-CUSTOMER-NAME**

Password: <<<use a strong, 16 digit password>>>

The user should be given the necessary Permissions to use this solution such as Project manager role, the necessary source and target languages, workgroups, workflow roles and clients.

Client ID and Project Types

A new Client ID should be created to support the integration with Salesforce. We would recommend keeping this Client separate from all other Clients and workstreams in SDL WorldServer. The Project Types and Attributes available to the Client will be presented to the users in Salesforce as Project Options to create translation projects against.

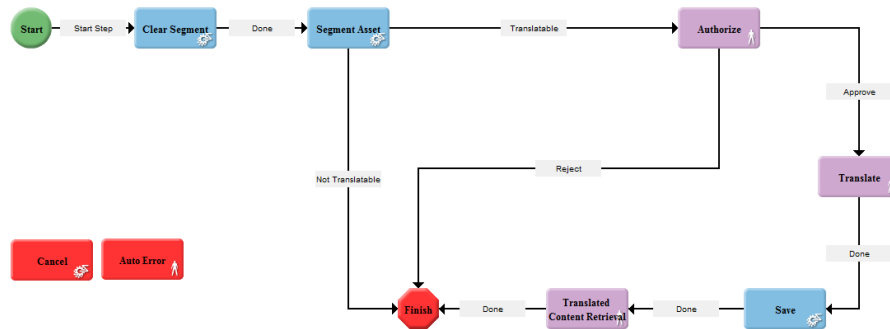
Project Types

You can create any Project Types and workflows you want to be available to the users of the App in Salesforce. Any standard workflow options are ok to use for your Salesforce content.

If you want to check project scope and approve project costs from the Salesforce interface in the SDL Managed Translation app, you'll need to add the **Authorize** stage to the workflow.

The workflow should also have a **Translated Content Retrieval** stage to ensure translations are returned to Salesforce at the end of the workflow.

An example workflow is shown below:



XML content

The SDL Managed Translation produces XML from the records in Salesforce, so the workflow needs to be setup for XML. Please contact SDL for the appropriate XML Options file – this should always be checked and tested to ensure all of the content is appropriately extracted.

Ensure that UTF-8 encoding is enforced for all XML content.

Other content

The app also allows you to send any document attachment for translation. Ensure that any documents you want to be able to process are setup in your Project Type, for example Microsoft Word documents.

Attributes

Adding attributes to the configurations will make them dynamically appear in the Create Project screen in the SDL Managed Translation app in Salesforce. Ensure the appropriate descriptions are included so that users understand why they are required. Also ensure the correct behavior is supported in the Attributes such as forced, default options.

About SDL



SDL (LSE: SDL) is the global innovator in language translation technology, services and content management. For more than 20 years, SDL has transformed business results by enabling nuanced digital experiences with customers across the globe so they can create personalized connections anywhere and on any device. Are you in the know? Find out more at [SDL.com](https://www.sdl.com).

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