

SDL Trados GroupShare Cloud

Quick Start Guide



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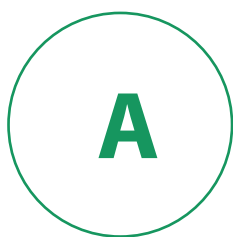


SDL Trados GroupShare QuickStart Guide

SDL Trados GroupShare Cloud 2017

July 2017





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1

Welcome to SDL Trados GroupShare Cloud

We have compiled some best practices on how to make optimal use of your **SDL Trados GroupShare Cloud** space. This quick start guide is meant for users new to SDL Trados GroupShare Cloud.

The training guide will walk you through the following five topics:

1. Log in
2. Dashboard
3. Organizations, Users and Roles
4. Server-based translation memories (TMs)
5. Server-based termbases (TBs)
6. Server based projects

Additional resources for SDL Trados GroupShare support are available to you:

- The SDL Knowledge Base is available for your use at all times. Visit gateway.sdl.com.
- The SDL Trados GroupShare [online help](https://docs.sdl.com) is available on the docs.sdl.com website.

SDL Trados GroupShare Cloud includes a complementary Support contract or PSMA , which you can use for assistance, guidance or support related to any SDL Trados GroupShare Cloud issues. However, if you need support for SDL Trados Studio, you need to purchase a separate SDL Trados Studio PSMA, if your SDL Trados Studio license is not already covered by PSMA.

You can log a support ticket via your SDL Customer Account which can be accessed at www.sdl.com.



Log in

Once you have received your credentials, you can log in via SDL Trados GroupShare Cloud or via SDL Trados Studio.

Logging in to SDL Trados GroupShare Cloud

Visit SDL Trados GroupShare Cloud to manage and set up your space.


Procedure

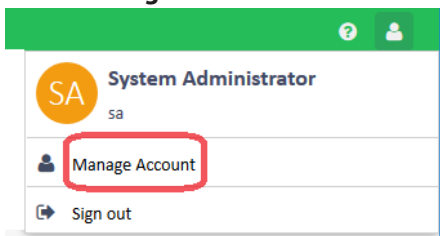
1. Navigate to SDL Trados GroupShare Cloud. The SDL Trados GroupShare Cloud login dialog is displayed.
2. Select **SDL Authentication**, type your login details and click **Login**. Your user name is your email address. You will be logged in to SDL Trados GroupShare Cloud.

Change your password from SDL Trados GroupShare Cloud

Once you have logged in, the first thing we recommend is that you **change your password**.

Procedure

1. In the right-hand side corner of SDL Trados GroupShare Cloud, click .
2. Select **Manage Account**.



3. On the [user.name] page, under **Contact information**, place the cursor in the **Password** field and type the new process.
4. Repeat the new password in the **Confirm Password** field. At this stage, you can change your **Display Name**, and update your **Email**, **Phone**, and **Description**.

Tip: Note that the **Email** specified here will be used by SDL Trados GroupShare Cloud to send notifications relating to project assignments.

5. Click **Finish**. From now on, you will use the new password to login to SDL Trados GroupShare Cloud.

Connecting to SDL Trados GroupShare Cloud from SDL Trados Studio

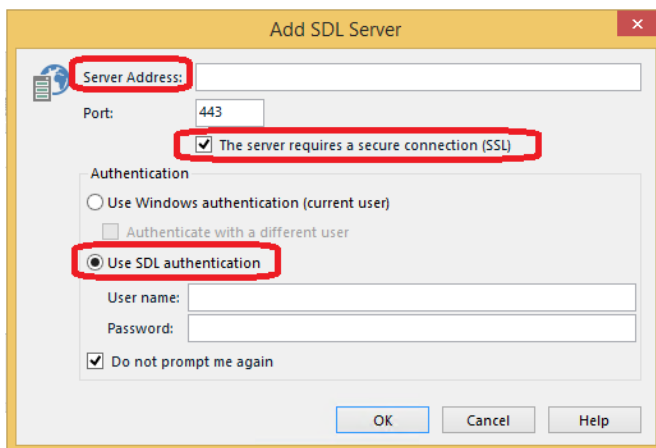
After SDL Trados Studio is installed, you can access SDL Trados GroupShare Cloud from within SDL Trados Studio.

Procedure

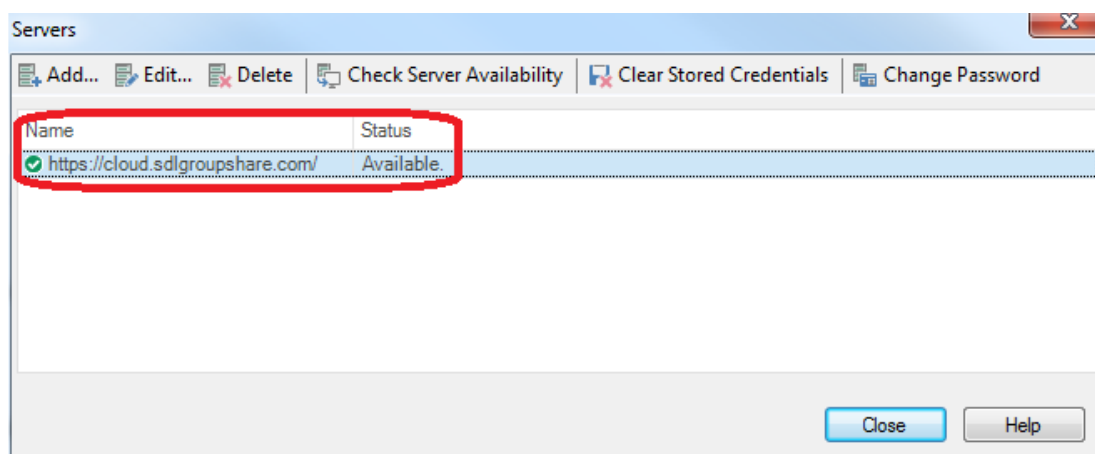
1. Log in to SDL Trados Studio.
2. Go to **File > Setup**.
3. Click **Servers** and click **Add**.



4. In the **Add SDL Server** dialog, enter the server address and your SDL Trados GroupShare Cloud credentials.



5. Click **OK**. You are now connected to the SDL Trados GroupShare Cloud server.

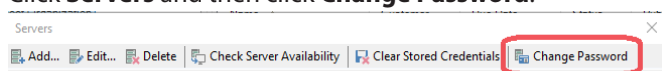


Change your password from SDL Trados Studio

Once you have logged in to SDL Trados GroupShare Cloud from SDL Trados Studio, you can change your password, if you hadn't already done so.

Procedure

1. In SDL Trados Studio, go to **File > Setup**.
2. Click **Servers** and then click **Change Password**.



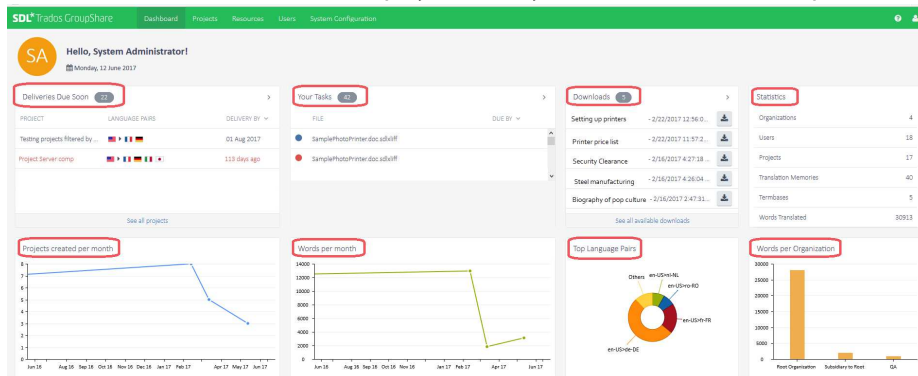
3. Change your password and confirm it.



Dashboard

You can view a comprehensive status report of all the translation projects that are in progress in the SDL Trados GroupShare Cloud Dashboard.

The Dashboard is the first view displayed when you visit SDL Trados GroupShare Cloud.



The Dashboard contains widgets that inform you:

- What projects are due soon
- What tasks are assigned to the currently logged user
- Which of the requested download tasks are complete
- How many projects were created per month
- How many words were translated per month
- How many language pairs were used percentage-wise
- How many words were translated per organization.

Note: The actual display of the SDL Trados GroupShare Cloud Dashboard may vary depending on the users' access rights and their associated privileges.

4

Organizations, Users and Roles

SDL Trados GroupShare Cloud helps you collaborate with your fellow translators and reviewers by enabling a shared space for projects and their resources.

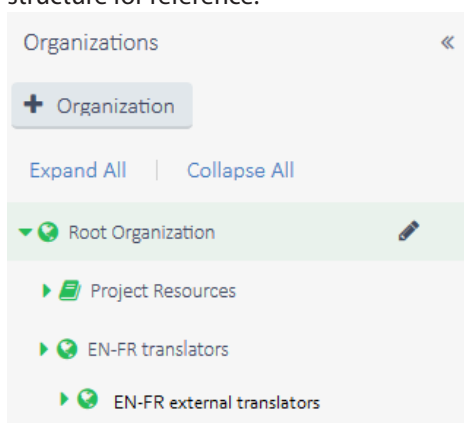
Before you start creating **Users** it is important to understand how SDL Trados GroupShare Cloud works. Therefore, we will briefly explain two main concepts of SDL Trados GroupShare Cloud: **Organizations** and **Roles**.

Organizations and Sub-Organizations

An SDL Trados GroupShare Cloud **Organization** can be compared to a folder in Windows Explorer. When you create users, you assign them to an **Organization** in order for them to consult and use the resources of that **Organization**: the project data, the translation memories (TMs) and the termbases (TBs).

Organizational structure

You start with only one **Organization** on the server, but you can create your own organizational structure. To do so, log in to SDL Trados GroupShare Cloud (using your login credentials) and select the **Users** view. As soon as you add an Organization (for example, an organization called "EN-FR Translators"), you can decide to create more Organizations on the same level (by using your Root Organization as your starting point), or you can decide to create a more nested structure with **Sub-Organizations** (by creating a new 'Sub-Org' called "EN-FR External Translators", for instance). Please see the following sample structure for reference:



The Organization tree is a predefined way of organizing your projects for regulated control and easy access.

Limited access to resources via Sub-organizations

To provide users with limited access to an **Organization** resource, you can configure a **Sub-Organization**. Sub-Organizations can be created based on several factors, such as: client, translation type or even geographical location. This way, you can ensure that users will only see the names of the customers they work for (as well as the TMs and Projects relevant to them).

Dynamic Resource Handling

SDL Trados GroupShare Cloud introduces *Dynamic Resource Handling*, which is an alternative way of regulating control and setup. How is this useful for you?

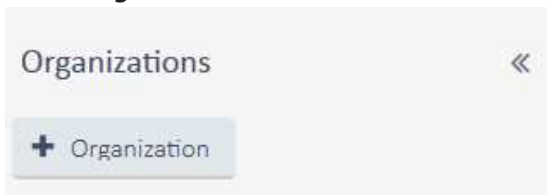
SDL Trados GroupShare Cloud enables you to add users to neutral Organizations, for example an Organization named, *External Collaborators*. Users who are members of neutral Organizations will not see or access any SDL Trados GroupShare Cloud hosted data such as: projects, TMs or TBs. Only when users are assigned to a project is access automatically granted to them, based on the requirements for that specific project and the associated privileges granted during user creation. Access will only be granted until users complete their task. Once completed, access is automatically revoked with no further intervention from the Project Manager.

Add Organizations

Every SDL Trados GroupShare Cloud instance sets a unique **Root Organization** by default. You can add as many Organizations to the **Root Organization**. Then, you can continue adding as many Sub-Organizations to these Organizations.

Procedure

1. Go to the **Users** view.
2. Select the Root Organization or the Sub-Organization under which you want to create nested Organizations.
3. Click **+ Organization**.



4. In the **Add Organization** dialog:

A screenshot of the 'Add Organization' dialog box. The title bar says 'Add Organization'. It contains two input fields: 'Name *' with a placeholder 'Enter a name' and 'Description' with a placeholder 'Enter a description'. Below these fields is a checkbox labeled 'Is Library'. At the bottom right of the dialog are two buttons: 'Finish' and 'Cancel'.

- a. Type a name for your Organization.
 - b. Optionally, enter a description.
5. Click **Finish**.

Users

As soon as you have completed the organizational structure, you can add users to SDL Trados GroupShare Cloud as per your subscription. **Users** refer to the translators, reviewers and collaborators who work on your translations. User creation is confined by the default roles and permissions available in SDL Trados GroupShare Cloud. No customization is available.

For each user you will have to indicate whether this user should get access to:

- All of your Organizations, in which case you can simply select the Root Organization and the correct role for that user
- Some of your Organizations, in which case you select the relevant Organizations and the relevant roles

It is possible to grant users access to different individual Organizations or to assign a different role for each Organization if required.

Note: When creating new users, you must use their email address as username.

Roles

An SDL Trados GroupShare Cloud role is a collection of permissions, which is assigned to users. The list of available roles is fixed and it cannot be customized.

As Administrator, you give roles to users, so they can use SDL Trados GroupShare Cloud to carry out job functions in SDL Trados GroupShare Cloud, SDL Trados Studio and SDL MultiTerm.

The SDL Trados GroupShare Cloud list of roles cannot be changed, as opposed to the regular SDL Trados GroupShare list of roles where new roles can be added.

SDL Trados GroupShare Cloud roles

There are six roles available in SDL Trados GroupShare Cloud:

- Administrator
- Project Manager
- Translator
- External Translator
- Reviewer
- External Reviewer

The table from the SDL Trados GroupShare Online Help > [Standard roles and permissions](#) shows the permissions assigned to each of these users. You will notice that Translators have the same permissions as Reviewers. Similarly, External Translators have the same permissions as External Reviewers. The main differences between Internal Translators/Reviewers and External Translators/Reviewers are that:

- External users cannot see the names of other users working on a project

- External users can only see the project files that have been assigned to them (typically by an Administrator or Project Manager)

Translators and Reviewers (whether external or internal) cannot create server-based TMs or perform TM maintenance (exports/imports/batch edits and deletes), whereas Project Managers can. Project Managers also have all the permissions related to project management (assigning users to files, adding files, checking out any project files, etc.). Administrators can do everything, including the creation of users and organizations.

SDL MultiTerm roles

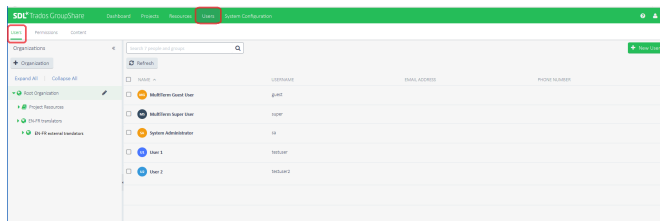
SDL MultiTerm is a termbase module which can be integrated with SDL Trados GroupShare Cloud via a separate installation from your SDL Customer Account. Term-related privileges are initially managed through the role granted to users.

Add users and assign user roles

Users are defined by the roles they have within Organizations. To give your users permissions and access to your projects and resources, you must assign them roles. Roles are helpful because they are like labels users carry with them. Therefore, it is easy to group, filter or quickly retrieve all your types of users.

Procedure

1. Go to the **Users** view and select the **Users** tab.



2. Select the Organization to which you want to add the new user.
3. In the upper right-hand corner of the page, click **New User**.
4. In the **Create User** wizard, fill in the account details.

The screenshot shows the 'Create User' wizard at the 'Contact Information' step. The left sidebar has 'Contact Information' selected. The main area contains the following fields:

- Organization ***: A dropdown menu with 'Root Organization' selected.
- User Type ***: A dropdown menu with 'SDL' selected.
- Display Name ***: A text input field with placeholder text 'Enter a display name'.
- Username ***: A text input field with placeholder text 'Enter a user name'.
- Password ***: A text input field with placeholder text 'Enter a password'.
- Confirm Password ***: A text input field with placeholder text 'Confirm your password'.
- Email**: A text input field with placeholder text 'Enter an email'.
- Phone**: A text input field with placeholder text 'Enter a phone'.
- Description**: A larger text input field with placeholder text 'Enter a description'.

At the bottom right, there are four buttons: 'Back', 'Next' (highlighted in green), 'Finish', and 'Cancel'.

Note: Remember that the **User Type** must be **SDL**, and that the **Username** must be the user's email address.

- Click **Next** and, in the **Roles** wizard section, choose which roles you want the new user to have within the Organization.

The screenshot shows the 'Create User' wizard at the 'Roles' step. The left sidebar has 'Roles' selected. The main area is divided into two sections: 'ORGANIZATION' and 'ROLES'.

- ORGANIZATION**: A dropdown menu with 'Select...' and a list of options: 'Root Organization', 'QA', 'Subsidiary 2 to Root', and 'EN-FR translators'.
- ROLES**: A list of roles with a 'Select...' dropdown and a '+' button to add more roles.

At the bottom right, there are four buttons: 'Back', 'Next' (highlighted in green), 'Finish', and 'Cancel'.

- Click **Finish** to create the new user and assign the selected roles.

Note: Only the **System Administrator** and members of the **Administrator** role can create, edit or delete users. Roles assigned within an organization propagate to its Sub-Organizations.

5

Server-based TMs

Server-based translation memories (TMs) are shared repositories of previously translated text, used and updated by concurrent users. This means that when translating you have access to the latest changes while maintaining consistency across your entire translation work.

Server-based TMs are placed into Organizations. All the users in that Organization will have access to the TMs in the Organization and to the TMs linked to the Organization. Moreover, Dynamic Resource Handling ensures secure, fast and reliable access to resources and seamless collaboration inside the Organization.

The current section covers the creation of TMs both from SDL Trados GroupShare and from SDL Trados Studio.

Configure server-based TMs in SDL Trados GroupShare Cloud

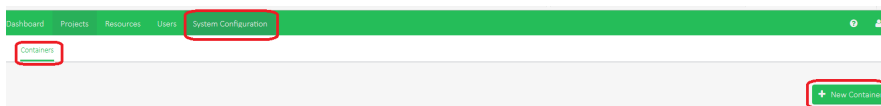
Server-based TMs are managed through SDL Trados GroupShare Cloud, but stored in a space called *container*, which is associated with your Organizations.

Step 1: Add containers

Upon SDL Trados GroupShare Cloud installation, a default container is set. Depending on your needs and the complexity of your Organization, you can add as many containers as you need. One container can support several TMs.

Procedure

1. Go to the **System Configuration** view.
2. Click the **Containers** tab, and then click **New Container**.



3. In the **Create Container** dialog:

 A screenshot of the 'Create Container' dialog box. The title bar says 'Create Container'. It contains five input fields:

- Location ***: A dropdown menu showing 'Root Organization'.
- Database Server ***: A dropdown menu showing 'ccsqlserver2'.
- Name ***: A text input field with the placeholder 'Enter a name'.
- Description**: A larger text input field with the placeholder 'Enter a description'.
- Database Name ***: A text input field with the placeholder 'Enter a Database Name'.

 At the bottom right of the dialog, there are two buttons: 'Finish' and 'Cancel'.

- a. Choose a location for your container within the Organization.

- b. Choose a database server.
- c. Enter a container name and a database name.

Tip: Containers enable the efficiency of the TM backup process. Backup is TM-specific and it is performed within the TM-associated container.

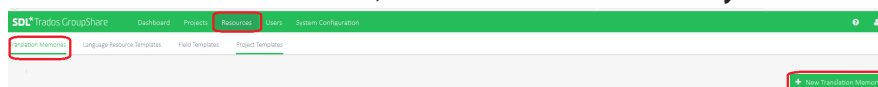
- d. Optionally, provide a description for your container.
4. Click **Finish**.

Step 2: Create server-based TMs

Create server-based TMs to store and share your translations in an online environment.

Procedure

1. Go to the **Resources** view.
2. In the **Translation Memories** tab, click **New Translation Memory**.



3. On the **General Settings** page:

 A screenshot of the 'Create Translation Memory' form in the SDL Trados GroupShare interface. The form is titled 'Create Translation Memory' and has a sidebar on the left with a list of settings: 'General Settings' (selected), 'Language Pairs', 'Fields', 'Language Resources', 'Advanced Settings', and 'Summary'. The main area is titled 'General Settings' and contains several input fields: 'Name *' (with placeholder 'Enter a name'), 'Description' (with placeholder 'Enter a description'), 'Copyright' (with placeholder 'Enter a copyright'), 'Location *' (a dropdown menu showing 'Root Organization'), and 'Container *' (a dropdown menu showing 'cc-gs-int01'). At the bottom of the form, there are four buttons: 'Back', 'Next' (highlighted in green), 'Finish', and 'Cancel'.

- a. Type the TM details.
- b. Choose a location for your TM.
4. Select **Next**.
5. On the **Language Pairs** page, select the source and target languages for your language pairs.

Create Translation Memory

- Language Pairs
- Fields
- Language Resources
- Advanced Settings
- Summary

Language Pairs

SOURCE LANGUAGE	TARGET LANGUAGE
Select source language...	Select target language...

6. Select **Next**.

7. Optionally, on the **Fields** page, do any of the following:

Create Translation Memory

- Fields
- Language Resources
- Advanced Settings
- Summary

Fields

Use Template:

FIELD NAME	TYPE	VALUES
Start typing...	Select...	-

- Select a field template. The field columns are automatically updated with the template content.
- Configure the field columns.
- Leave the field columns blank.

8. Select **Next**.

9. Optionally, on the **Language Resources** page, select a language resource template or configure each language resource.


Create Translation Memory

- Language Resources
- Advanced Settings
- Summary

Language Resources

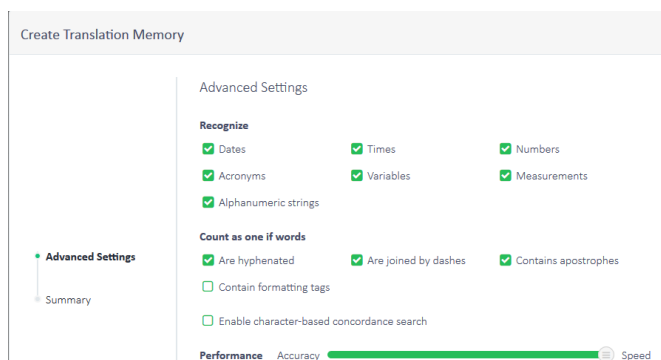
Use Template:

SOURCE LANGUAGE	ABBR.	ORDINALS	SEGMENTATI...	VARIABLES
-----------------	-------	----------	---------------	-----------

- If you select a field template, the field columns are automatically updated with the template content
- If you select , edit the fields and click **Finish**.

10. Select **Next**.

11. On the **Advanced Settings** page, review the default checkboxes, and select or clear, if necessary.



12. Click **Finish**.

Tip: If you have *.tmx files, you can import them directly into SDL Trados GroupShare Cloud. A report is available to confirm if the import is successfully completed.

Migrate file-based TMs from SDL Trados Studio

If you have one or more file-based TMs in SDL Trados Studio, you can easily migrate them to a server-based format. This helps you reuse your existing content in a shared format.

Step 1: Establish your connection to SDL Trados GroupShare Cloud

To migrate your legacy file-based TMs to a server-based format, you first need to ensure SDL Trados GroupShare Cloud is connected to SDL Trados Studio. For more information, refer to the "Logging in to SDL Trados GroupShare from SDL Trados Studio" section of the current quick start guide.

Step 2: Upgrade your file-based TMs to SDL Trados GroupShare Cloud

The TM upgrade process supports any of the following formats: *.tmx (SDL Translation Memory Exchange Documents), *.tmw (SDL Trados Studio 2007 File-based Translation Memories), *.mdb (SDLX 2007 File-based Translation Memories), *.txt (SDL Workbench or WinAlign Export) and *.sdltm (SDL Trados Studio 2011 File-based Translation Memories which you want to merge into a new TM). Once the TM upgrade process is complete, your TM is upgraded to the *.sdltm format. Creating server-based TMs and importing file-based data can also take place directly from within the **Translation Memories** view of SDL Trados Studio, but this process requires several manual tasks. As a result, SDL recommends that you take advantage of the automated process detailed below.

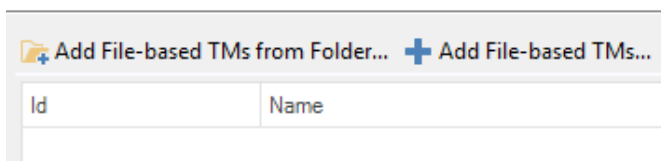
Procedure

1. On the **Welcome** view, on the **Home** tab, in the **Translation Memory** group, click **Upgrade Translation Memories**.
2. On the **Input Translation Memories** page, click:

Upgrade Translation Memories

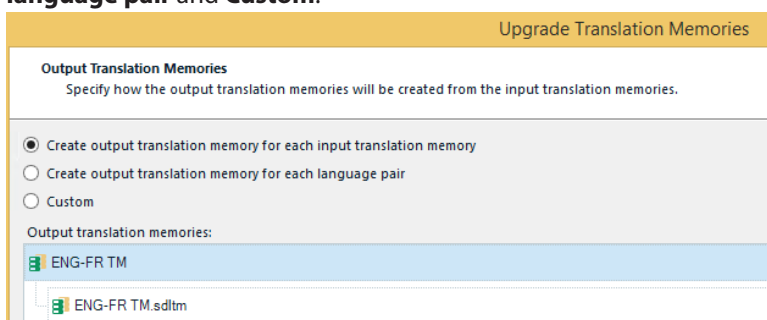
Input Translation Memories

Select the input translation memories that you wish to upgrade and



Id	Name
----	------

- **Add File-based TMs from Folder**, to add several file-based TMs grouped under a file, to the conversion process.
 - **Add File-based TMs**, to add one or more file-based TMs individually, to the conversion process.
3. Click **Next**.
 4. On the **Output Translation Memories** page, decide whether you want to create a TM for each input TM or for each language pair by choosing one of the options: **Create output translation memory for each input translation memory**, **Create output translation memory for each language pair** and **Custom**.



Upgrade Translation Memories

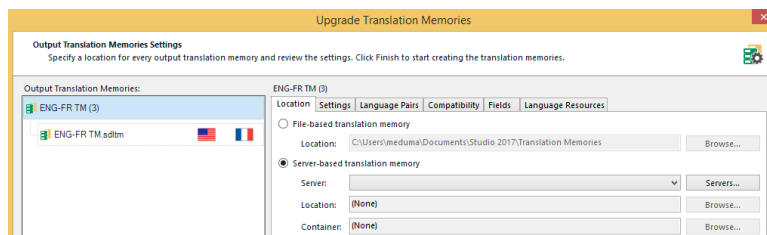
Output Translation Memories
Specify how the output translation memories will be created from the input translation memories.

☒ Create output translation memory for each input translation memory
☐ Create output translation memory for each language pair
☐ Custom

Output translation memories:

- ENG-FR TM
- ENG-FR TM.sdltm

5. Click **Next**.
6. On the **Output Translation Memories Settings** page, in the **Location** tab, select **Server-based translation memory** and:



- Choose a server from the **Server:** list.
- Browse for a location for your server-based TM. You basically have to choose under which organization you want to place your server-based TM.
- Browse for a container for your TM.

Tip: If you have more than one TM listed, repeat step 7 for each TM.

- Click **Finish**.

Link resources across Organizations

When one of your Project Managers creates a server-based TM, this TM is always stored in a container on your server. Your custom containers, servers and TMs are stored in your Root Organization. However, if you created users who do not have access to the Root Organization, they will be restricted from: consulting the list of available servers and containers, adding server and containers, and creating TMs. What can you do to give these users access to your resources? You can simply link servers, containers and TMs to the Organization where users have access to.

About this task

TM links allow users from other Organizations to access your TM. It will often be the case that TMs need to be shared among several Organizations. Imagine, for example, a scenario in which you have a TM related to the domain IT, which you use for different customers. It would be troublesome if you had to copy that TM into each Organization you created for those individual customers. In this case, you can simply link the TM that you stored in one Organization, to another one - like creating a shortcut in Windows Explorer. By doing this, you make sure that users will be able to access the TM, whether they are members of one Organization or the other. Resource linking is only required if you are not fully relying on Dynamic Resource Handling.

Procedure

- In SDL Trados GroupShare Cloud, go to the **Users** view and select the **Contents** tab.
- Select the organization where the resource (container + TM; TB) is located.
- Select the resource you want to link.

Note: Containers include TMs, therefore when you link a container, you must link its associated TM as well (and vice versa). TBs (termbases), on the other hand, are not container-dependent.

- Click **Link Resource**.
- In the **Link Resources** dialog, select the location where you want the resource to be linked. This location is the Organization users have access to.

6. Click **Finish**.





Search 4 content resources

Refresh

Move Resource

Link Resource

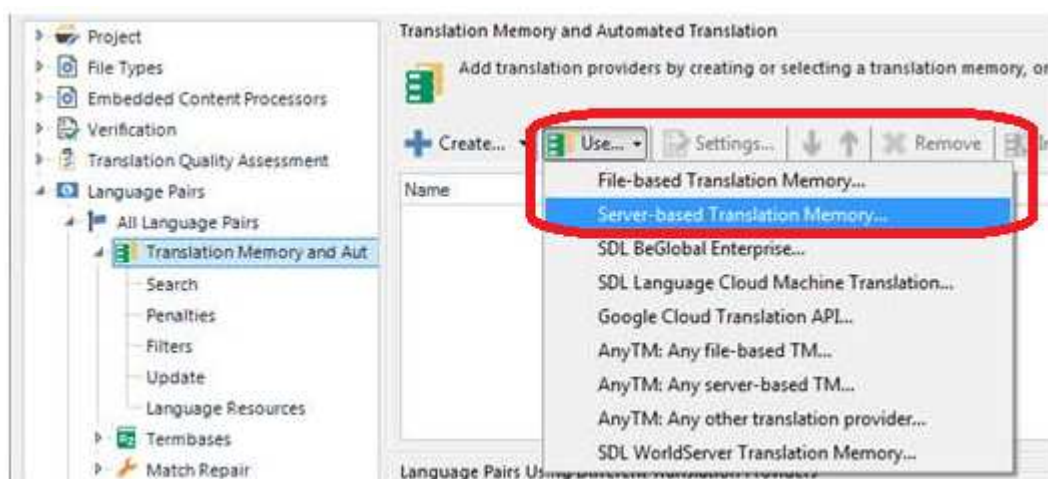
Unlink Resource

<input type="checkbox"/>	NAME ^	DESCRIPTION	LINKED FROM	TYPE
<input checked="" type="checkbox"/>	 Example Server TM_Mult...		Root Organization	translation memory
<input type="checkbox"/>	 GroupShare Server Term...		Root Organization	termbase
<input type="checkbox"/>	 SDLTradosGS2017		Root Organization	TM DB server
<input checked="" type="checkbox"/>	 SDLTradosGS2017 Contai...		Root Organization	TM container

Tip: If you want to physically move the resource out of an Organization and into another one, you can follow the procedure above, but use the **Move Resource** button. When you no longer want to share a resource, click **Unlink Resource**.

Server-based TMs in SDL Trados Studio

Server-based TMs can be used either as part of server-based projects, or simply as part of file-based projects, by adding server-based TMs.



6

Server-based termbases

Server-based termbases (TBs) are shared databases containing terms and term-related information. The terms may be single words or short phrases, in multiple languages, representing industry-specific or company-specific terminology. Server-based TBs can only be created by an SDL MultiTerm Administrator from SDL MultiTerm Desktop. SDL MultiTerm Desktop is a separate application that can be downloaded from within your SDL Customer account, at <http://www.sdl.com/>.

Integration with SDL MultiTerm Desktop

In addition to server-based translation memories (TMs), users can also translate with the help of server-based termbases (TBs). For this reason, SDL Trados GroupShare Cloud integrates with SDL MultiTerm Desktop, which supports users in their terminology work.

A termbase consists of:

- An *.xml file = term-related data
- An *.xtb file = termbase definition

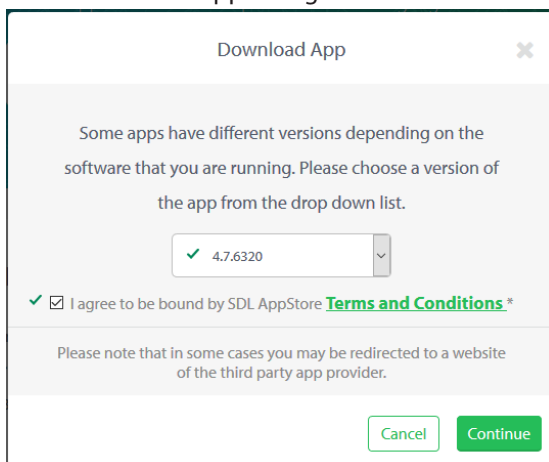
The *.xml and *.xtb files can either be created from scratch or obtained from existing file-based termbases. Therefore, please ensure you have SDL MultiTerm Desktop installed from your SDL Account. You need to have the rights to create server-based TBs, which is currently a privilege associated to Administrators and Project Managers.

Convert term lists to TBs

If you have terms or internal glossaries in formats such as *Excel, you can easily convert them into a termbase by using the free *Glossary Converter* application.

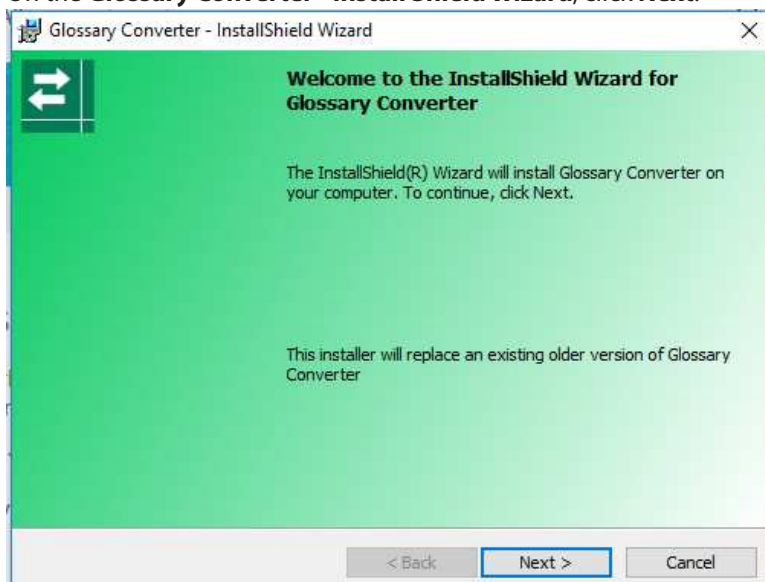
Procedure

1. Go to <http://appstore.sdl.com/>.
2. Go to the **Apps for terminology** section and click **Glossary Converter**.
3. Click **Download**.
4. In the Download App dialog:



- a. Select a version.

- b. Select the checkbox corresponding to the *Terms and Conditions* section.
- c. Click **Continue**.
5. Save *GlossaryConverter.zip*.
6. Open *GlossaryConverter.zip*, and then right-click *setup*.
7. On the **Glossary Converter - Install Shield Wizard**, click **Next**.



8. Click **Yes**.
9. Click **Finish**.

What to do next

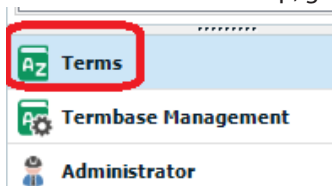
You can now drag and drop your file, and convert it, provided it is in a supported format.

Gathering requirements from file-based TBs

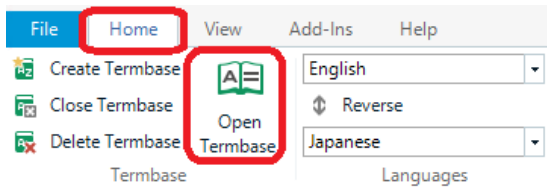
If you already work with file-based TBs, you may want to create server-based TBs starting off from the file-based ones. This can save you a lot of effort, as your new server-based TBs will preserve the structure and data of your file-based ones. The first step you need to take is extract the structure (*.xdt file) and data (*.xml file) from your file-based TBs. You will need these files during the creation process of server-based TBs.

Procedure

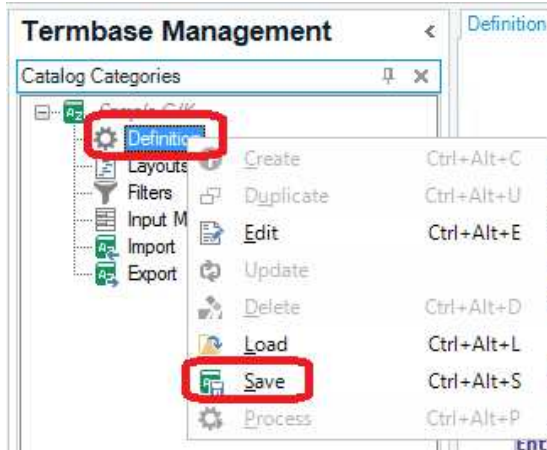
1. In SDL MultiTerm Desktop, go to the **Terms** view.



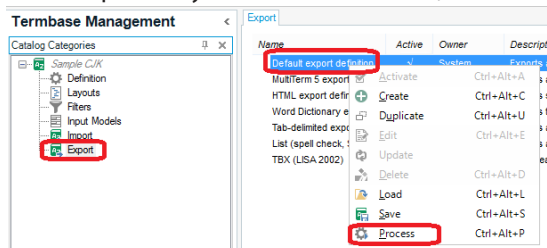
2. On the **Home** tab, click **Open Termbase**.



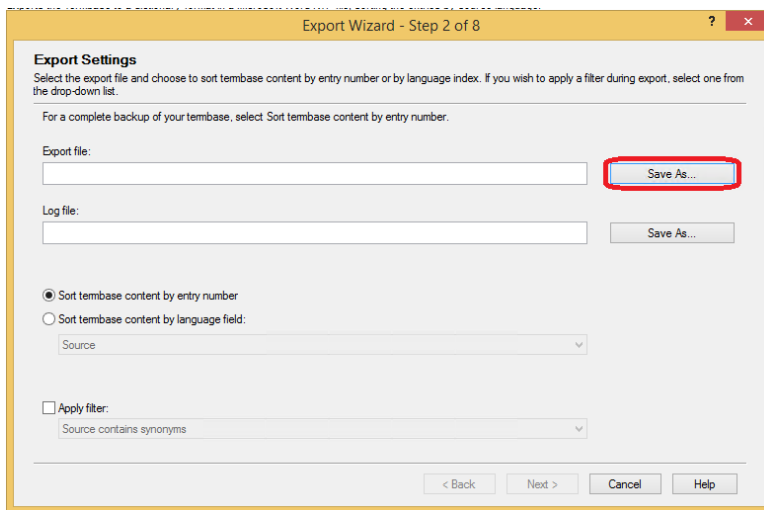
- Go to the **Termbase Management** view, right-click **Definition**, and, on the context menu, click **Save**. This will provide you with an *.xdt file, containing your termbase structure.



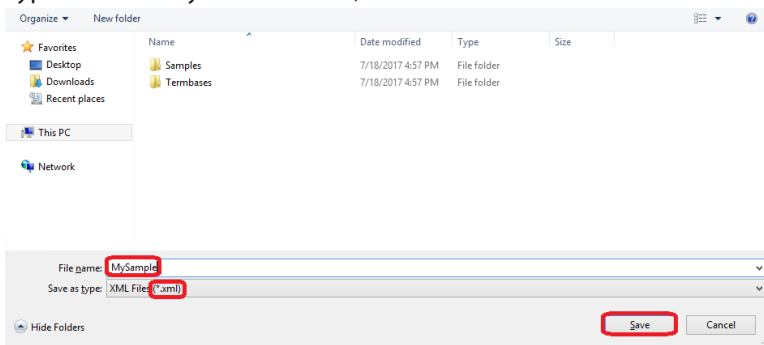
- Click **Export**, then right-click **Default export definition**, and, on the context menu, click **Process**. This will provide you with an *.xml file, containing your termbase data.



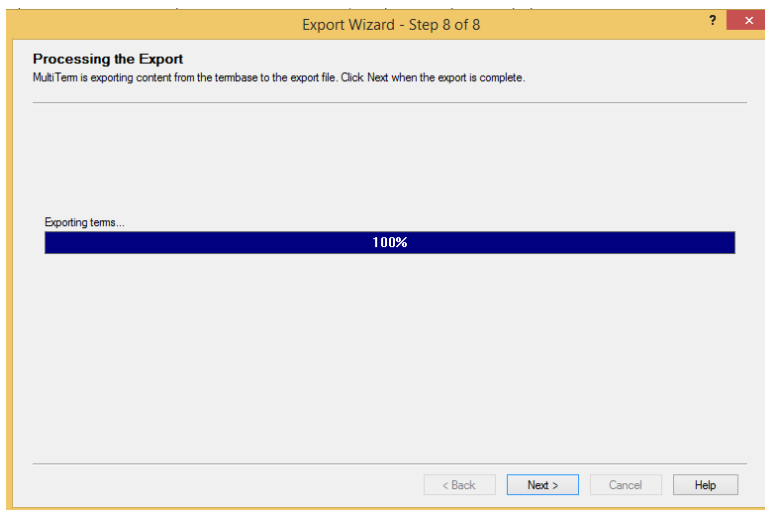
- On the **Export Wizard - Step 2 of 8** page, on the right-hand side of the **Export file:** box, click **Save As**.



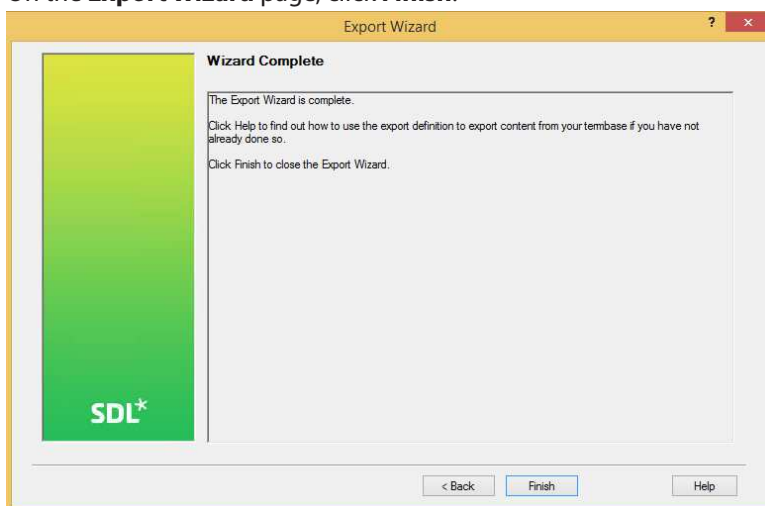
6. Type a name for your *.xml file, and then click **Save**.



7. On the **Export Wizard - Step 2 of 8** page, click **Next**.
8. On the **Export Wizard - Step 8 of 8** page, click **Next**.



9. On the **Export Wizard** page, click **Finish**.

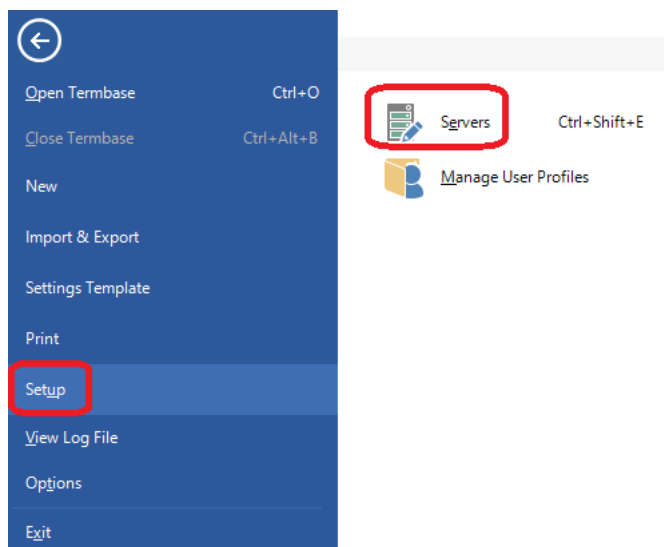


Connect to SDL MultiTerm Administrator

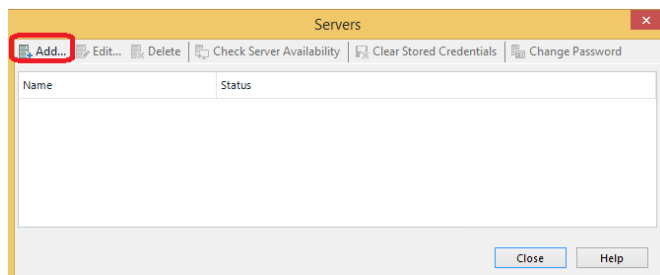
SDL MultiTerm Administrator is an application which enables you to create the server-based TB and manage the MultiTerm users who have access to SDL Trados GroupShare Cloud projects and resources. You can access SDL MultiTerm Administrator by adding it to SDL MultiTerm Desktop 2017.

Procedure

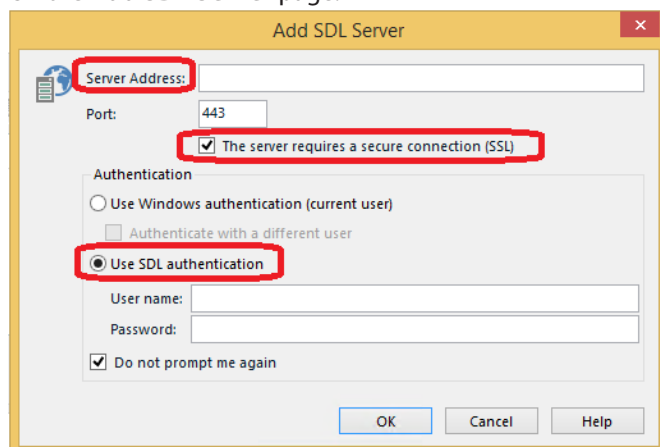
1. Log in to SDL MultiTerm Desktop.
2. Go to **File > Setup > Servers**.



3. On the **Servers** page, click **Add**.



4. On the **Add SDL Server** page:

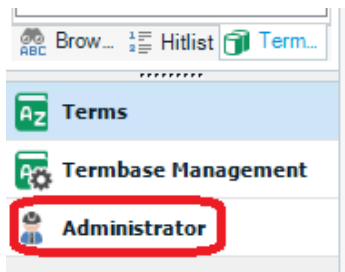


- a. Type the SDL Trados GroupShare Cloud server address.
 - b. Select **The server requires a secure connection (SSL)**. The port changes from 80 to 443.
 - c. Select **Use SDL authentication** and provide your SDL Trados GroupShare Cloud user name and password.
5. Click **OK**.

Remember: Only the Administrator has access to SDL MultiTerm Administrator.

Results

SDL MultiTerm Administrator is now added to SDL MultiTerm Desktop and you can start creating server-based termbases.

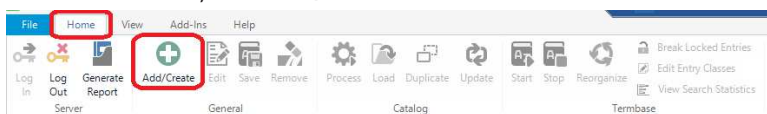


Convert file-based TBs to server-based TBs

Up to this point, you extracted your termbase structure (*.xdt file) and your termbase data (*.xml file) from an available file-based TB. You also connected to MultiTerm Administrator. It is now time to create a server-based TB starting from its file-based version.

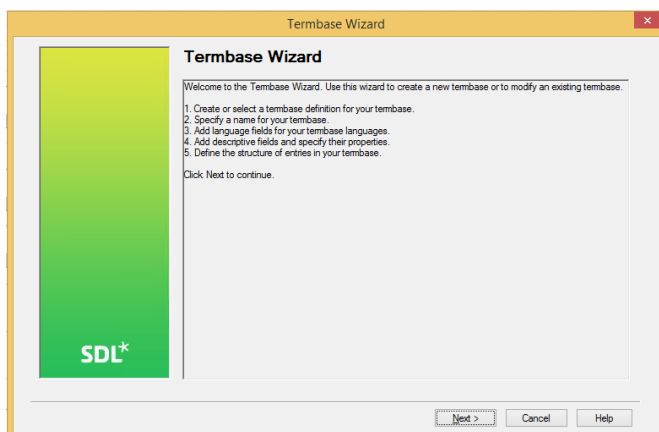
Procedure

1. Log in to SDL MultiTerm Desktop and make sure you added SDL MultiTerm Administrator.
2. On the **Home** tab, click **Add/Create**.



Tip: Alternatively, right-click **Server**, and, on the context menu, click **Add/Create**.

3. On the **Termbase Wizard** page, click **Next**.



4. On the **Termbase Wizard - Step 1 of 5** page, select **Load an existing termbase definition file**, click **Browse** and choose the *.xdt file you extracted during the gathering prerequisites step.

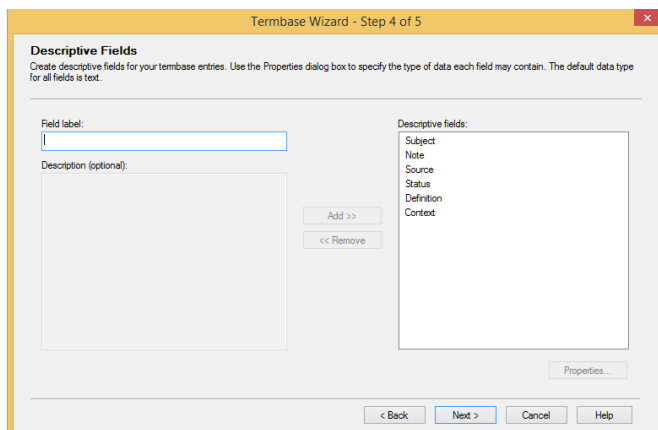


Note: Alternatively, you can select the **Create a new termbase from scratch** option, which is detailed further down the document.

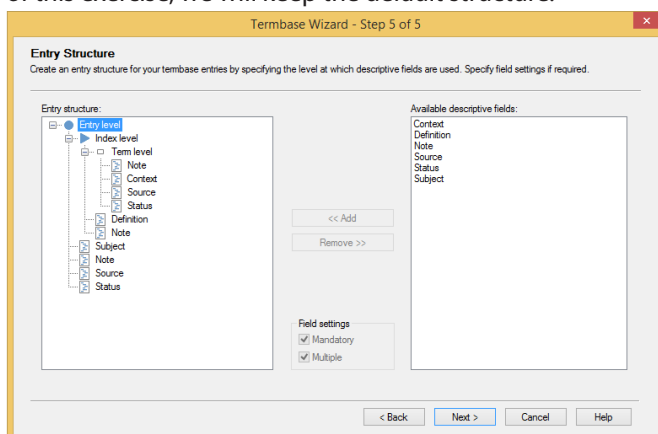
5. On the **Termbase Wizard - Step 2 of 5** page:

- a. Type a name for your termbase.
 - b. Optionally, provide a description.
 - c. Browse for the SDL Trados GroupShare Cloud **Organization** where you want to store the termbase.
6. On the **Termbase Wizard - Step 3 of 5** page, use the **Languages** drop-down list to select your languages of interest, and click **Add** or **Remove** to include them in your termbase. Click **Next**.

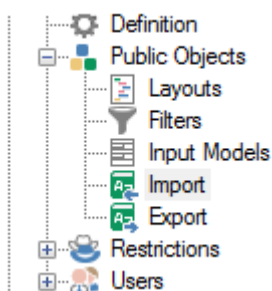
7. On the **Termbase Wizard - Step 4 of 5** page, consult the fields that you can use to store your terms against. You can add customized fields by typing them under **Field label** and clicking **Add**. For the purpose of this exercise, we will keep the default fields which originated from your *.xdt file.



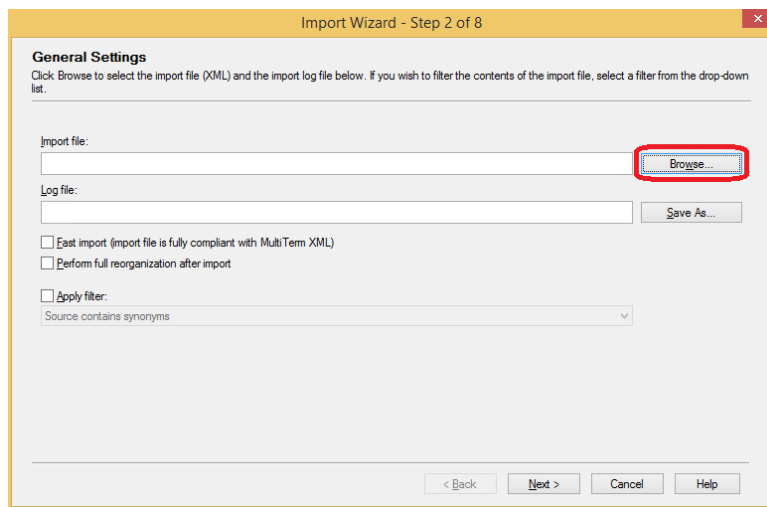
8. On the **Termbase Wizard - Step 5 of 5** page, use **Add** or **Remove** to customize the **Entry structure** of the termbase (on the left) with the **Available descriptive fields** (on the right). For the purpose of this exercise, we will keep the default structure.



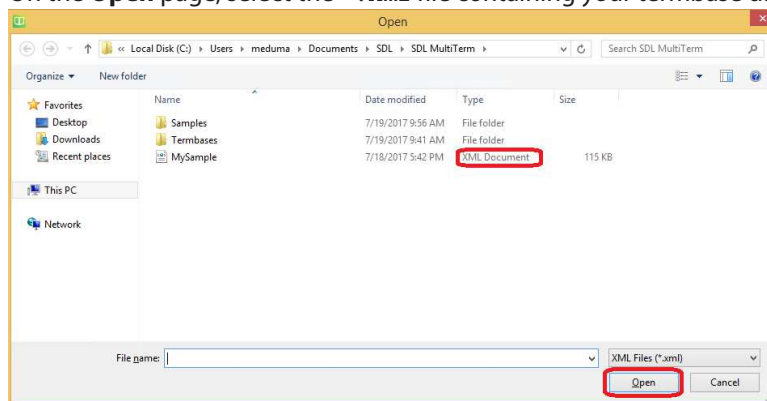
9. On the last page of the **Termbase Wizard**, click **Finish**.
10. In the **Administrator** view, under **Server**, expand the server-based termbase of interest.
11. Expand **Public Objects**, click **Import**, right-click **Default import definition**, and, on the context menu, click **Process**.



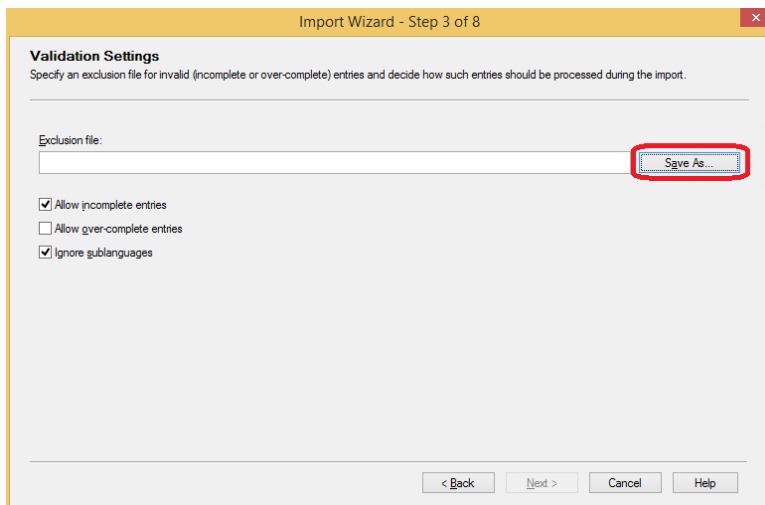
12. On the **Import Wizard - Step 2 of 8** page, on the right-hand side of the **Import file:** box, click **Browse**.



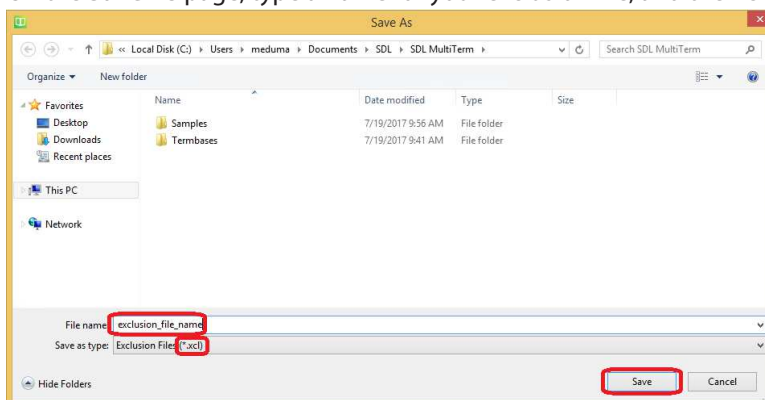
13. On the **Open** page, select the *.xml file containing your termbase data, and then click **Open**.



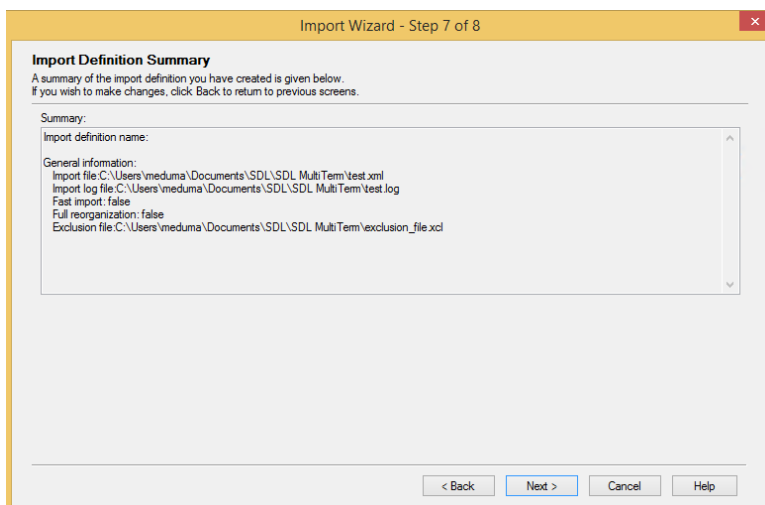
14. On the **Import Wizard - Step 2 of 8** page, click **Next**.
15. On the **Import Wizard - Step 3 of 8** page, on the right-hand side of the **Exclusion file** box, click **Save As**. Exclusion files (*.xcl) are created to store any invalid entries saved during the import process.



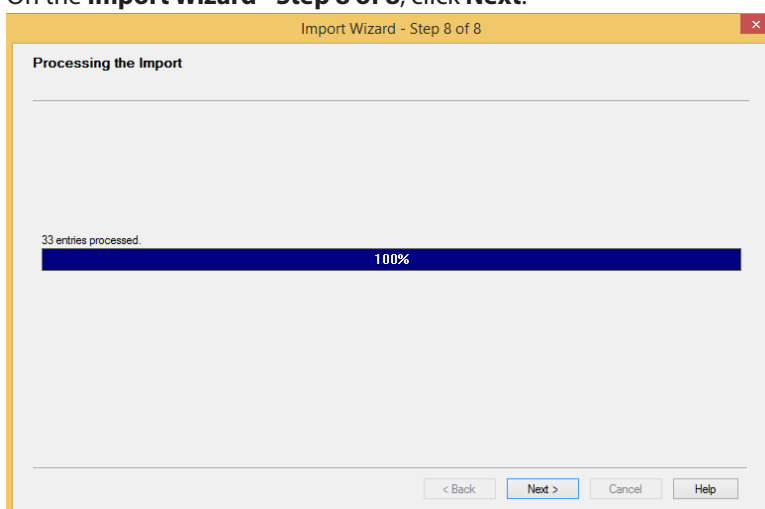
16. On the **Save As** page, type a name for your exclusion file, and then click **Save**.



17. On the **Import Wizard - Step 3 of 8**, click **Next**.
18. On the **Import Wizard - Step 7 of 8**, click **Next**.



19. On the **Import Wizard - Step 8 of 8**, click **Next**.



20. On the **Wizard Complete** page, click **Finish**.

Create server-based TBs from scratch

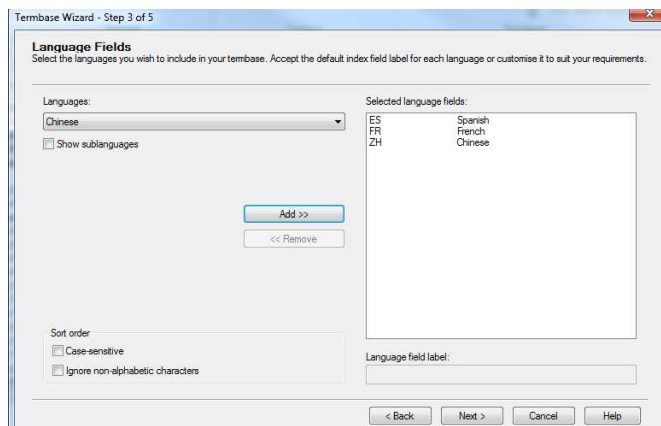
You can also create a server-based TBs from scratch, which means that you will manually define all the details of your termbase structure.

Procedure

1. Perform steps 1 to 3 from the previous topic "Convert file-based termbases to server-based termbases".
2. On the **Termbase Wizard - Step 1 of 5** page, select **Create a new termbase definition from scratch**.

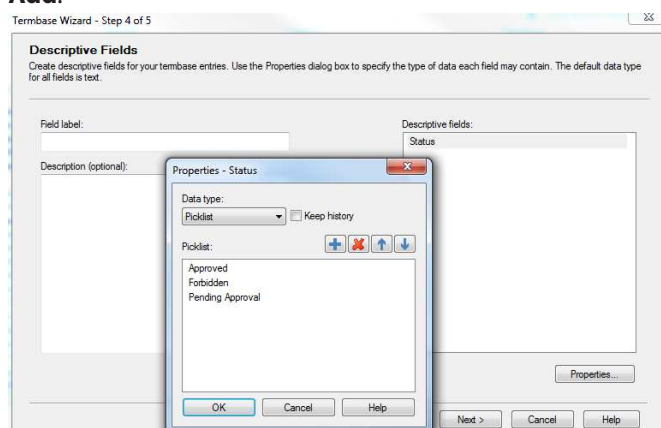
3. On the **Termbase Wizard - Step 2 of 5** page:

- a. Type a name for your termbase.
 - b. Optionally, provide a description.
 - c. Browse for the SDL Trados GroupShare Cloud **Organization** where you want to store the termbase.
4. On the **Termbase Wizard - Step 3 of 5** page, use the **Languages** drop-down list to select your languages of interest, and click **Add** or **Remove** to include them in your termbase. Click **Next**.



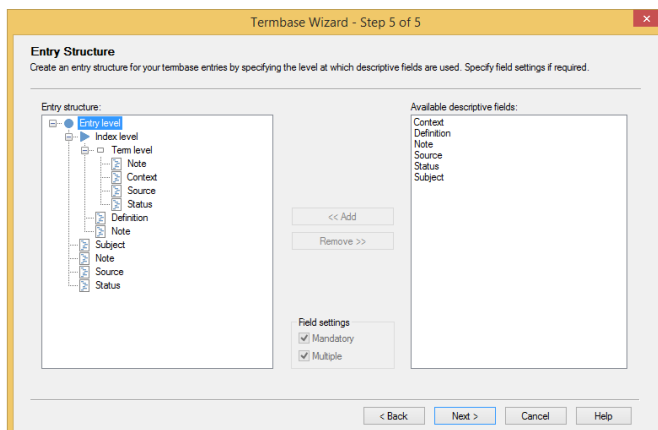
Tip: Terminology can be dependent or independent on regions. Use **Show sublanguages** as you see fit.

- On the **Termbase Wizard - Step 4 of 5** page, type a field label name under **Field label** and click **Add**.



Note: For each field label or description field which you apply to your terms, you can specify the data type.

- On the **Termbase Wizard - Step 5 of 5** page, use **Add** or **Remove** to customize the **Entry structure** of the termbase (on the left) with the **Available descriptive fields** (on the right).



Note: Term verification from within SDL Trados Studio is based on the fields that are placed at term level, such as *Status*. Any given field can be placed in more than 1 level such as term level or index level.

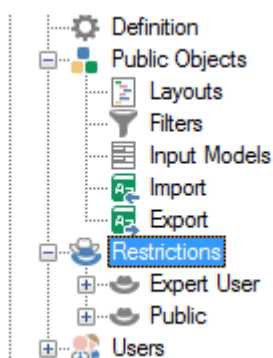
7. On the last page of the **Termbase Wizard**, click **Finish**.

SDL MultiTerm user roles

Only members of the *Administrator* role have access to the SDL MultiTerm Administrator component of SDL MultiTerm Desktop. Administrators are responsible for server-based termbase administration and MultiTerm user management.

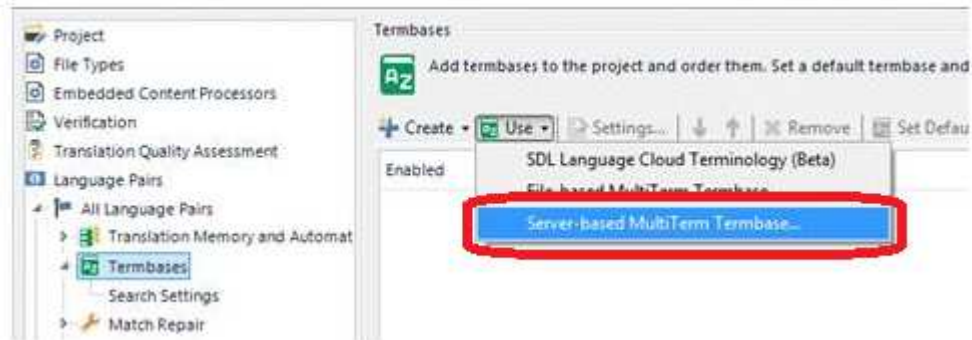
Users get access to server-based termbases based on the roles assigned to them in SDL MultiTerm Administrator. By large, users automatically gain read-only access rights to termbases, as part of the privileges associated to translators or external users for example.

Administrators must consult the privileges or rights associated to user roles (*Expert User* and *Public*), and decide where termbases are placed within SDL Trados GroupShare Organizations for restricted access. Administrators can also customize the restrictions they may wish to impose on users.



Server-based TBs in SDL Trados Studio

Server-based TBs can be used either as part of server-based projects, or simply as part of file-based projects, by adding server-based TBs.





Server-based projects

Now that you have added your users and assigned them specific roles, created one or more server-based TMs and/or TBs where access is granted either directly from within the associated Organization or via Dynamic Resource Handling, you can create server-based projects. Server-based projects help you store and manage the content which needs to be translated.

View server-based projects in SDL Trados GroupShare Cloud

To check the details of a server-based project at a glance, check the **Projects** view and consult a project's: name, publish date, delivery date, recipient, status, language pairs and location within SDL Trados GroupShare Cloud.

Procedure

1. Go to the **Projects** view.
2. Consult all your available project in the **All projects** tab.

Tip: Use the side **Filter** bar to sort your projects by **Publishing date**, **Delivery date**, **Status** or **Organization**.

Create server-based projects from the SDL Trados GroupShare Cloud workflow

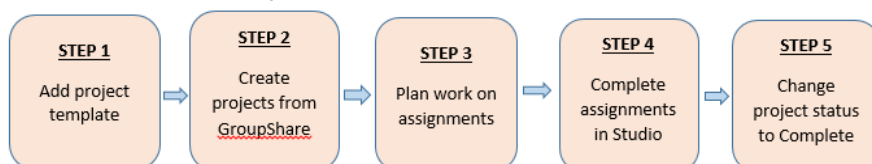
You can manage shared projects and file assignments directly from SDL Trados GroupShare Cloud.

Once a project is created in SDL Trados GroupShare Cloud and users are assigned work, you can:

- Search for the project in the **Projects** view.
- Open the project tab, and consult the project planning board and statistics.
- Move the project files on the task assignment board to mark their progress.

To manage GroupShare projects via SDL Trados GroupShare Cloud:

1. Make sure that you are a member of the *Project Manager* role or that you are in a role which includes the permissions required for managing file assignments.
2. Follow the workflow steps:

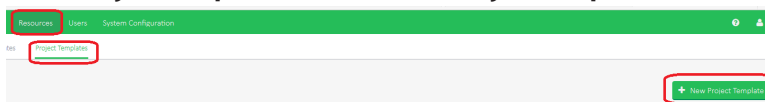


Step 1: Add the project template

Before you can create a project directly from within SDL Trados GroupShare Cloud, you need to have an SDL Trados Studio project template file to start with. Use SDL Trados Studio to create a project template (*.sdltpl) file. Project templates store settings such as: file types, TMs, TBs or other project-related data such as enforced QA settings.

Procedure

1. Log in to SDL Trados GroupShare Cloud and go to the **Resources** view.
2. In the **Project Templates** tab, click **New Project Template**.



3. In the **New Project Template** window:

 A screenshot of the 'New Project Template' dialog box. The title bar says 'New Project Template' and the subtitle says 'Follow the steps below to create a new project template.' The form contains four fields: 'Name *' with a placeholder 'Enter a template name', 'Description' with a placeholder 'Enter a description', 'Location *' with a placeholder 'Select a location' and a dropdown arrow, and 'Template File *' with a placeholder 'Project template file (.sdltpl)' and a 'Browse ...' button. At the bottom, there are 'Create' and 'Cancel' buttons. A note at the bottom states: 'Use SDL Trados Studio to create a project template (.sdltpl) that you can use to create new projects. File-based TMs are not supported.'

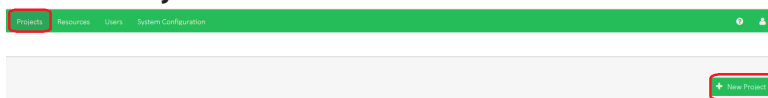
- a. Type a name and optionally a description for your project template.
 - b. Choose a location for your project template within your organization.
 - c. Browse for your template file.
4. Click **Create**.

Step 2: Create projects from within SDL Trados GroupShare Cloud

After you added the project template to SDL Trados GroupShare Cloud, you can create the actual shared project. A shared project is a storage for all the files that need to be translated. At this stage, you also decide which Organization is in charge of your project.

Procedure

1. Create a *.zip archive of the files you want to translate.
2. In SDL Trados GroupShare Cloud, go to the **Projects** view.
3. Click **New Project**.



4. In the **New Project** window:

New Project
Follow the steps below to create a new translation project.

Name *	<input type="text" value="Enter a name"/>
Description	<input type="text" value="Enter a description"/>
Location *	<input type="text" value="Root Organization"/>
Template *	<input type="text" value="Select a template"/>
Project File *	<input type="text" value="Zip archive, translatable and reference file"/> <input data-bbox="790 929 874 963" type="button" value="Browse..."/>
Delivery Date	<input type="text" value=""/> <input type="button" value="at"/> <input type="text" value=""/>

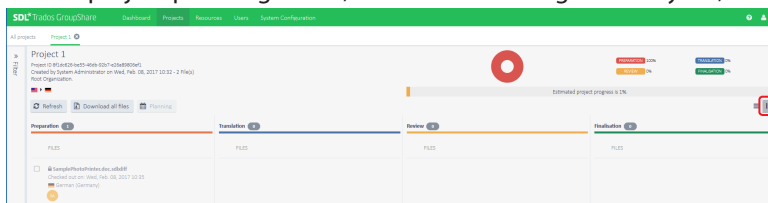
- a. Type a name, and optionally a description for your project.
 - b. Choose a location for your project in your organization.
 - c. Choose a project template from the list.
 - d. Browse for the *.zip archive containing your project files.
 - e. Optionally, set a due date for your project.
5. Click **Create**.

Step 3: Plan work on assignments

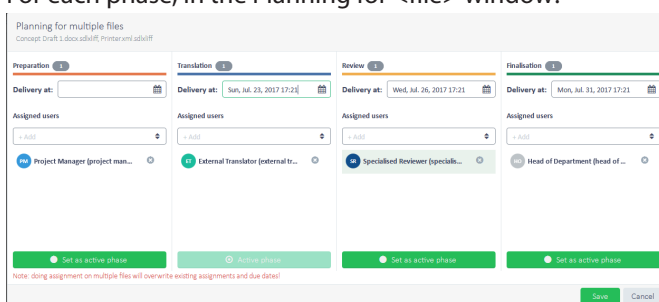
Once you have created the project, you can assign users to each of the supported phases, for each project file. Each of the users you assign at this stage will be notified by email when the file reaches the phase users are assigned to. As Project Manager (or as a user with relevant permissions) you can change the assignments in SDL Trados GroupShare Cloud any time during the project lifecycle. When you assign users to project phases, they are granted access to the project and its resources automatically, if role assignment and resource allocation were performed correctly in SDL Trados GroupShare Cloud.

Procedure

1. In SDL Trados GroupShare, go to the **Projects** view.
2. Click a project to open it.
3. On the project planning board, set to the task assignment layout, select one or more files.



4. Click **Planning for <n> files**.
5. For each phase, in the Planning for <file> window:



- a. Assign the users that work on the files from the **Assigned users** list.
 - b. Specify a due date in the **Delivery at** field.
 - c. Activate phase based on the next logical task to be completed.
6. Click **Save**.
The assigned user receives a notification email regarding the task assigned to them and the due date for it.

Step 4: Complete task assignments in SDL Trados Studio

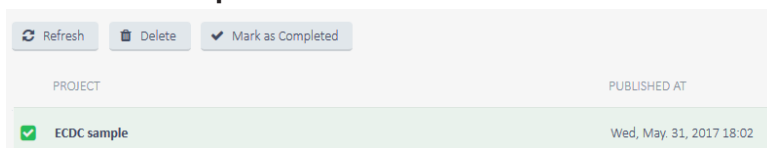
All users need to work within SDL Trados Studio if they want to collaborate through a supported SDL Trados GroupShare Cloud workflow, using any licensing type. When the Project Manager moves project files to a phase in SDL Trados GroupShare Cloud, the users who are assigned to that phase receive automatic notification emails. The notification emails inform users of the tasks they must work on and of the due date. The assigned users can start working on their translation or review tasks in SDL Trados Studio. For more information, consult "Step 4 Working on task assignments" of the "Create server-based projects using the SDL Trados Studio workflow" section. Files can be opened for translation, for review or for sign-off. Each mode by which you open the files gives you a customized view listing the relevant features you need to complete the task. Note that it is possible to use file-based projects while relying on SDL Trados GroupShare Cloud for centralizing your server-based TMs and TBs for licensing.

Step 5: Change project status to Complete

When users finish working on all assignments, you can change the project status from **In progress** to **Complete**. At this stage, all the project files are usually in the **Finalisation** phase. The status change takes place from within SDL Trados GroupShare Cloud.

Procedure

1. In SDL Trados GroupShare Cloud, go to the **Projects** view.
2. Select the checkbox(es) corresponding to the project(s) you want to complete.
3. Click **Mark as Completed**.




The project status changes to **Completed**.

Viewing server-based projects in SDL Trados Studio

To check the details of a server-based project in SDL Trados Studio at a glance, go to the **Projects** view and consult a project's: name, status, delivery date, creation date, location, server and Organization.

Procedure

1. Log in to SDL Trados Studio.
2. Go to the **Projects** view.
3. Consult the details of all available SDL Trados GroupShare Cloud projects. The following icons signal an SDL Trados GroupShare Cloud project in various stages of development:
 -  - the project is publishing
 -  - the project is published
 -  - the project publish failed

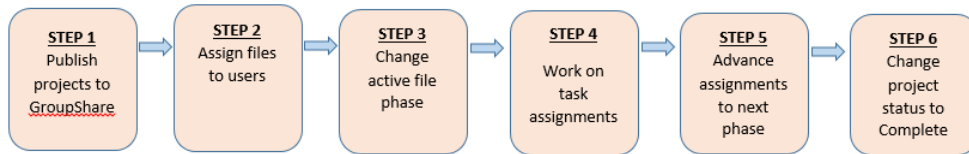
Create server-based projects using the SDL Trados Studio workflow

SDL Trados Studio and SDL Trados GroupShare Cloud synchronize continuously to support your projects and file assignments.

Once a project is created in SDL Trados Studio, you can publish it on SDL Trados GroupShare Cloud in order to assign the project work to one or more translators and reviewers. Translations projects can be managed in both SDL Trados Studio and SDL Trados GroupShare Cloud.

To complete a shared SDL Trados GroupShare Cloud project started in SDL Trados Studio:

1. Make sure that you are a member of the *Project Manager* role or that you are in a role which includes permissions required for publishing projects and managing file assignments.
2. Go through the workflow steps:



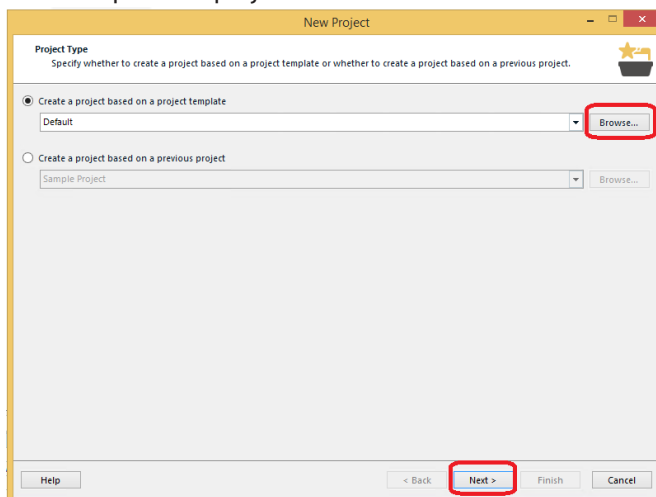
Step 1: Publish projects to SDL Trados GroupShare

When you publish an SDL Trados Studio project to SDL Trados GroupShare Cloud, you allow multiple users to work together to complete translation tasks. Two slightly different procedures are detailed at this stage: one referring to the projects that you are currently creating and another referring to the projects which are already created.

Publish new projects to SDL Trados GroupShare Cloud

Procedure

1. Log in to SDL Trados Studio and go to the **Projects** view.
2. On the **Home** tab, select **New Project** and go through the pages of the project creation wizard.
3. On the **Project Type** page, choose whether you want to create the project starting from a template or from a previous project.

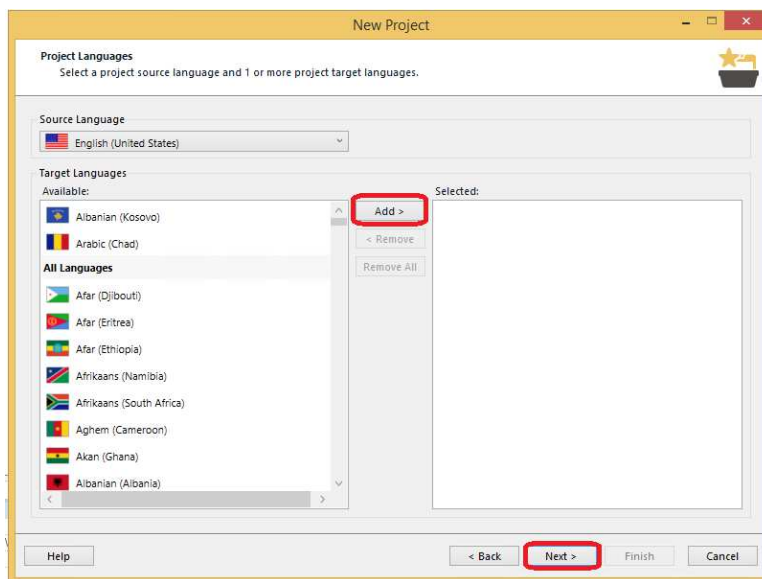


4. On the **Project Details** page, provide the relevant project information and select the **Publish project on GroupShare** checkbox:

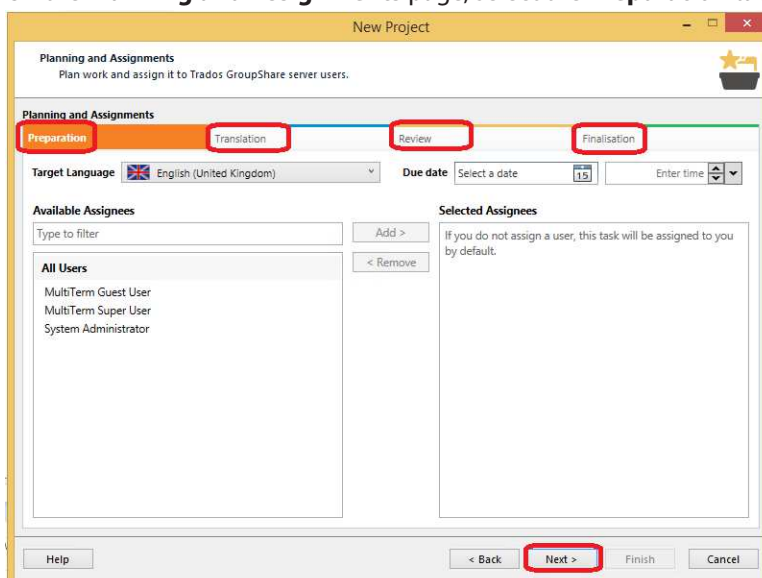
7 Server-based projects

- a. Choose a server.

- b. Browse a project location on the SDL Trados GroupShare Cloud server and click **OK**.
5. Click **Next**.
6. On the **Project Languages** page, select the source and target languages for your project.



7. On the **Planning and Assignments** page, select the **Preparation** tab and then:

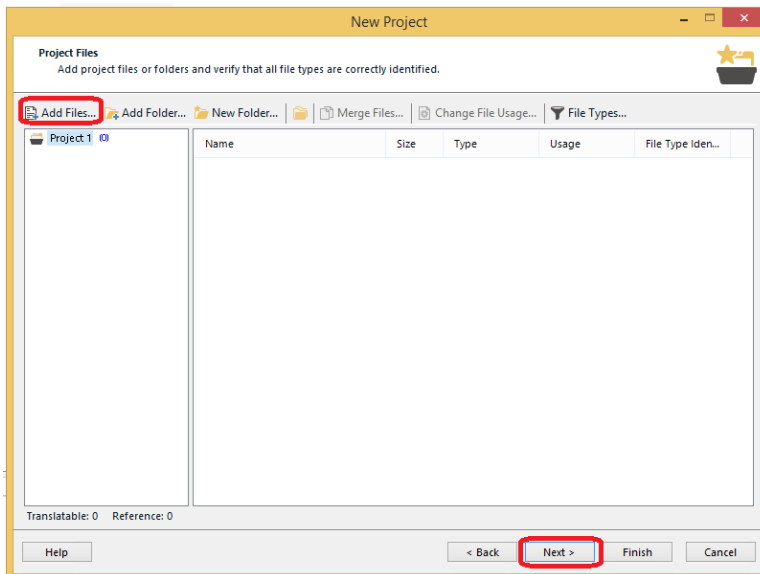


- Under **Due date**, choose an end date and time for the assignments in this stage.
- Optionally, under **Available Assignees**, type a user name, especially if you have a large user list and you want to retrieve them fast.
- Under **All Users**, select the user you want to add to the project phase, and click **Add**. Repeat this for as many users as you need for the project phase.

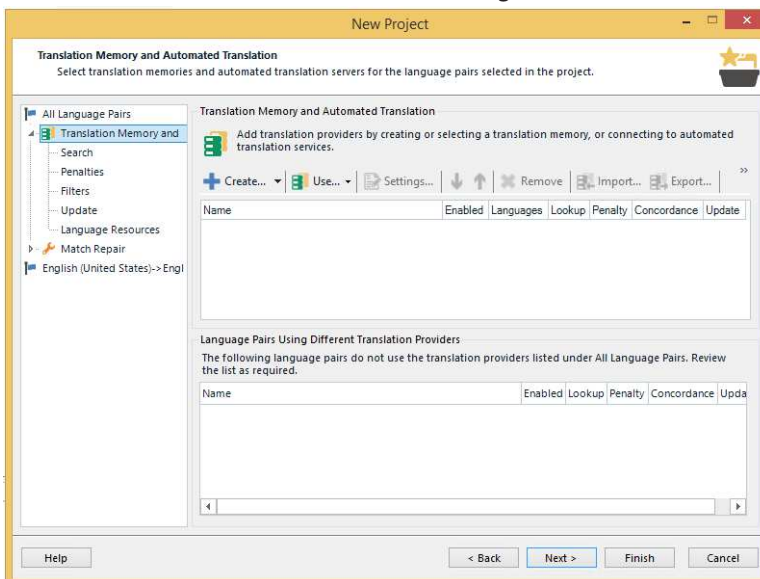
Tip: SDL recommends that you assign users to phases at this point. If, however, you decide to skip this step or, if changes occur after you publish the project to SDL Trados GroupShare Cloud, you can assign or unassign users from phases at a later date via the **Files** view from within SDL Trados Studio.

8. Repeat step 7 for the rest of the phases: **Translation**, **Review** and **Finalisation**.

9. Click **Next**.
10. On the **Project Files** page, add files or folders to your project.

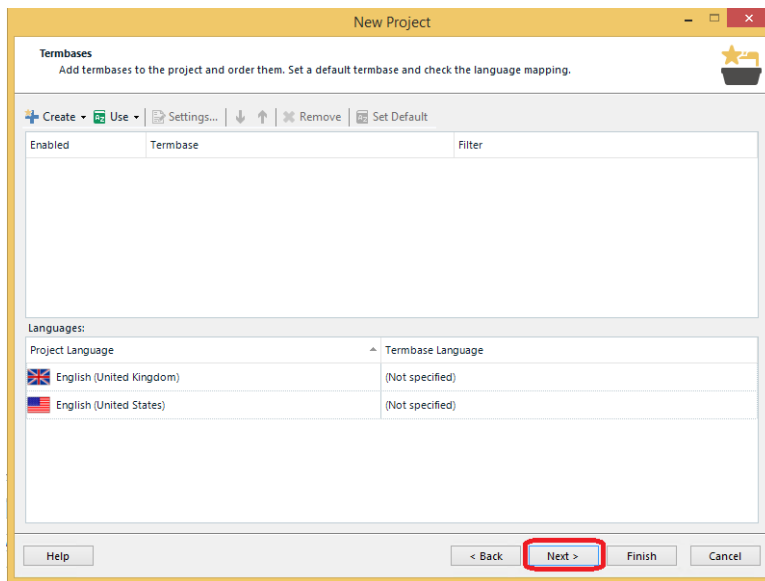


11. Click **Next**.
12. On the **Translation Memory and Automated Translation** page, configure any translation resources you want to include in your project. Use the **Create** or **Use** drop-down lists to either create a new translation resource (TM) or to add an existing translation resource (TM).



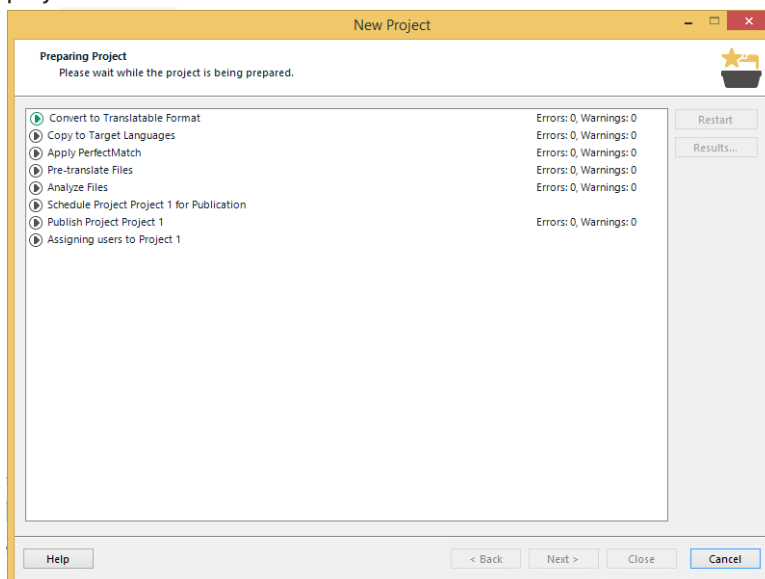
Remember: If you want your SDL Trados GroupShare Cloud users to access the same translation memory resources, you must create or use server-based translation memories.

13. Click **Next**.
14. On the **Termbases** page, configure any termbases you want to include in your project.



Note: For term consistency, you need to refer to your server-based TBs, not to your file-based TBs.

15. Click **Next**.
16. On the **Preparing Project** page, choose the task sequences that will prepare and/or pre-translate your project files. If you decide to use the *Prepare* batch task, this sequence includes the creation of project translation memories.



Note: Project TMs can be file-based or server-based.

17. Click **Next**, and then click **Close**.

Remember: For routine translation jobs, it is useful to have templates to start with. At this stage, save the template and its assigned users.

Results

Name	Type
Sample Project	Studio project
GroupShare Server Project	Trados GroupShare project

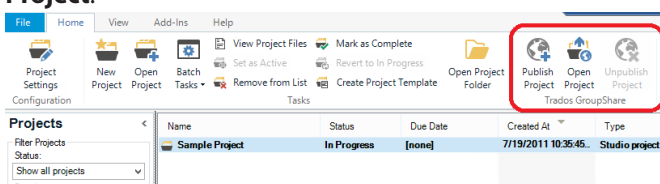
When the project is published, SDL Trados GroupShare Cloud displays the new project in the **Projects** view.

SDL Trados GroupShare Cloud then analyzes the permissions of the users who are members of SDL Trados GroupShare Cloud roles on the server, and makes the project files visible to the appropriate users in SDL Trados Studio.

Publish existing projects to SDL Trados GroupShare

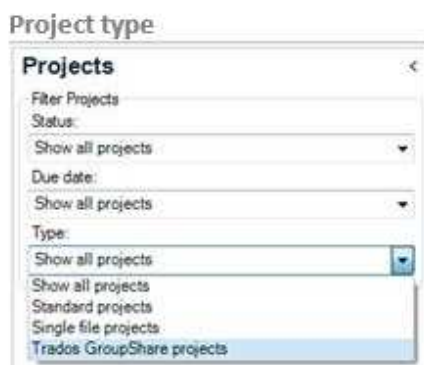
Procedure

1. Log in to SDL Trados Studio and go to the **Projects** view.
2. Select the project you want to publish to SDL Trados GroupShare Cloud.
3. On the **Home** tab, in the **Trados GroupShare** layout (the file assignment layout), select **Publish Project**.



Note: Any file-based resources (TMs or TBs) which are linked to the project due to be published to SDL Trados GroupShare Cloud will need to be removed and replaced with their server-based equivalent. This is done via **Project Settings**.

4. In the **Publish Project** dialog, browse a project location on the SDL Trados GroupShare server, select **OK** and, then, select **Finish**.



Results

When the project is published, SDL Trados GroupShare Cloud displays the new project in the **Projects** view.

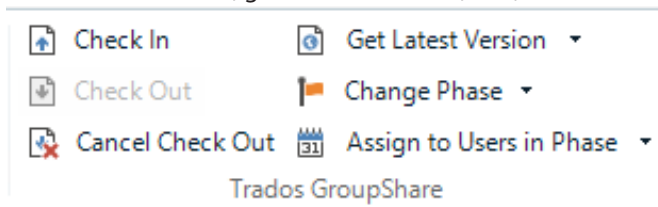
SDL Trados GroupShare Cloud then analyzes the permissions of the users who are members of SDL Trados GroupShare Cloud roles on the server, and makes the project files visible to the appropriate users in SDL Trados Studio. You can use filters to locate the relevant project based on type.

Step 2: Assign files to users

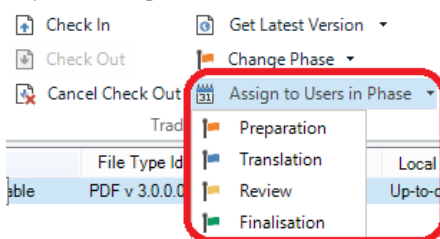
After publishing your project to SDL Trados GroupShare Cloud, you can delegate the translation work to specific users, so that they can start translating or reviewing the project files. When the allocated files reach the phase where the users are assigned to work on them, SDL Trados GroupShare Cloud automatically sends the assigned users a phase change notification email. This informs the users they can start working on the files you assigned to them.

Procedure

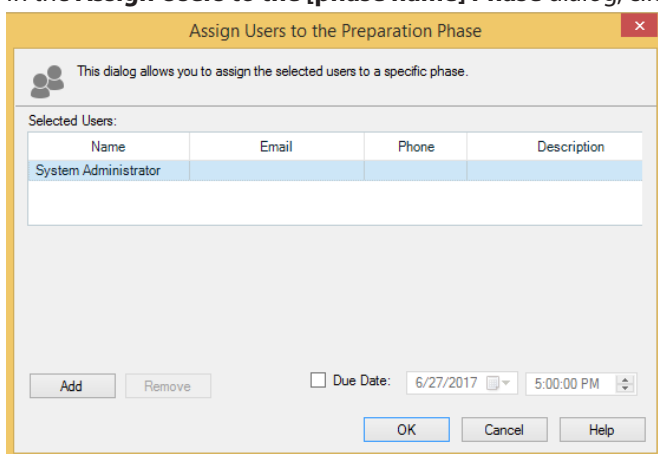
1. In SDL Trados Studio, go to the **Files** view, and, on the **Home** tab, select the task assignment layout.



2. Expand **Assign to Users in Phase** and select a phase.

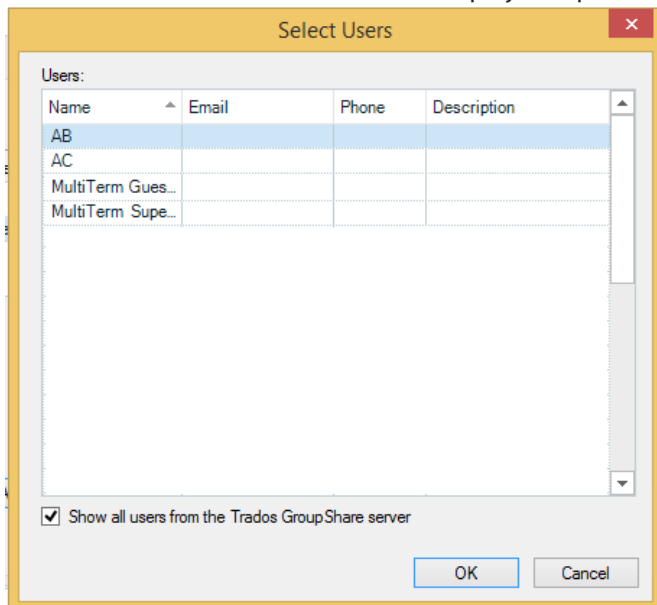


3. In the **Assign Users to the [phase name] Phase** dialog, click **Add**.



4. In the **Select Users** dialog, select **Show all users from the GroupShare server**, and consult the list

of users available on the server where the project is published.



5. Select the user you want to assign work to and select **OK**.
6. In the **Assign Users to the [phase name] Phase** dialog, select **OK**.
7. Repeat steps 3 - 7 to add users to all the phases the file(s) will go through.

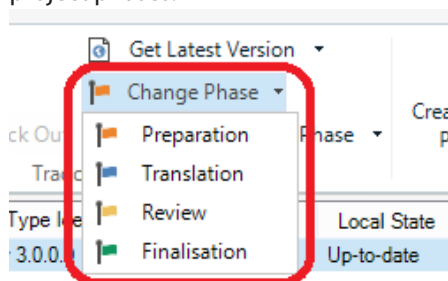
Note: If you add or remove assigned users during the current phase, SDL Trados GroupShare Cloud sends an assignment change email.

Step 3: Change the active file phase

Once users have been allocated to the files, you can set the project phase according to the task which needs to be completed.

Procedure

1. In SDL Trados Studio, go to the **Files** view and select one or more files.
2. On the **Home** tab, expand **Change Phase** and assign project files to one of the four available project phases.



Results

SDL Trados GroupShare Cloud displays the current phase of each file in the **Projects** view when you open a project. This information is visible to all the users who have permission to see the project files.

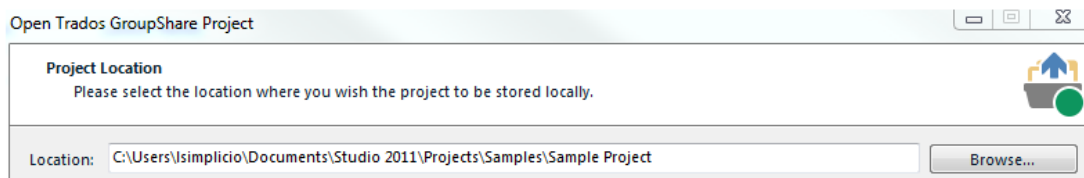
Name	Checked Out To	Preparation	Preparation Due Date	Translation	Translation Due Date	Review	Review Due Date	Finalisation
SecondSample.docx.sdxliff	(none)	Project Manager	31/12/2017 18:00:00	LSP	31/12/2017 18:00:00	Project Manager	31/12/2017 18:00:00	Project Manager
Product_List.xlsx.sdxliff	(none)	Project Manager	31/12/2017 18:00:00	External Translator	27/04/2017 10:30:00	Specialised Reviewer	18/05/2017 09:45:00	Head of Department
SamplePresentation.pptx	External Translator	Project Manager	31/12/2017 18:00:00	Internal Translator	27/04/2017 10:30:00	Specialised Reviewer	18/05/2017 09:45:00	Head of Department
Seat Match.docx.sdxliff	Internal Translator	Project Manager	31/12/2017 18:00:00	Internal Translator	27/04/2017 10:30:00	Specialised Reviewer	18/05/2017 09:45:00	Head of Department
Answering_Machine.pdf.s...	Specialised Reviewer	Project Manager	31/12/2017 18:00:00	Internal Translator	27/04/2017 10:30:00	Specialised Reviewer	18/05/2017 09:45:00	Head of Department

Step 4: Work on task assignments

When the assigned users receive notification of a pending assignment, they must check out the assigned file from SDL Trados GroupShare Cloud.

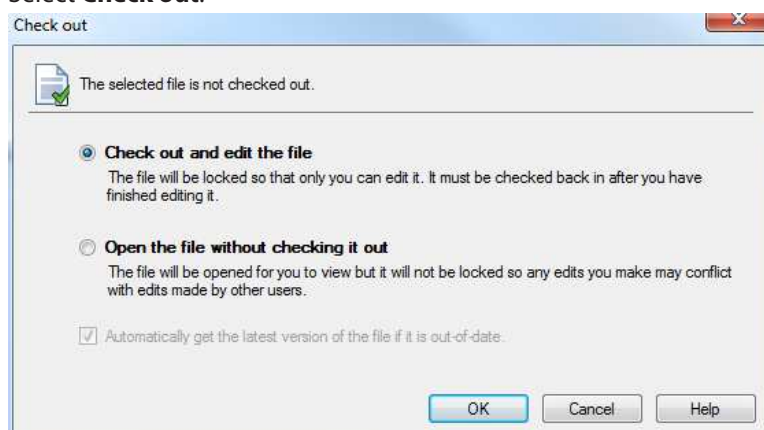
Procedure

1. In SDL Trados Studio, go to the **Projects** view, and specify a local user path where you store your own user-specific copy of the project.



Tip: Alternatively, click the link in the notification email to open your SDL Trados GroupShare Cloud project to your assigned files.

2. Go to the **Files** view and double click the files you want to check out.
3. On the **Home** tab, select one of the following: **Open For Translation**, **Open For Review**, **Open For Sign-off**, depending on your assigned tasks and project phases.
4. Select **Check out**.



Tip: When users check out their assigned files, SDL Trados GroupShare Cloud shows this information to all users associated to this project, in the **Checked out to** column, in the **Files** view.

5. Start working on the file.

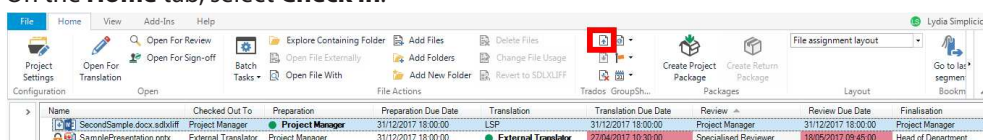
Tip: If the Project Manager wants to roll back to a previous version of the file, they can right-click the file and select **Download Specific Version**. Moreover, the Project Manager can cancel any file that is checked out by a user for reassignment.

Step 5: Advance assignments to the next phase

Once the assigned users complete their translation or review work, they must check the files back to SDL Trados GroupShare Cloud and advance them to the next project phase.

Procedure

1. In the **Files** view, select the file you want to check in.
2. On the **Home** tab, select **Check in**.

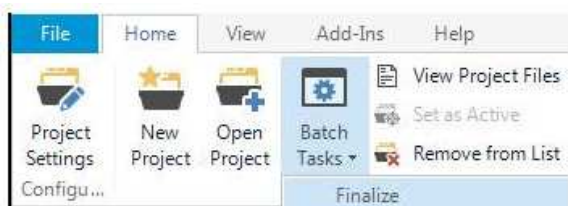


3. Expand **Change Phase** and select the next phase the file should go to.

Note: If there are users already assigned to work on the file in the new phase, SDL Trados GroupShare Cloud sends these users a phase change notification email and updates the information in the **Current Phase** column.

Step 6: Change project status to Complete

At the end of the project, when all translation or review work is finished, all project files are usually in the **Finalisation** phase. This is an indication that users have completed all the assignments. It is best practice to run the **Finalize** batch task. During this step, the TMs will be updated with the latest, approved version of the translation, and the target files will be generated. Thereafter, you can mark the project as **Complete**.



Procedure

1. Log in to SDL Trados Studio.
2. Go to the **Projects** view and select the project you want to complete.
3. On the **Home** tab, click **Mark as Complete** or use the project menu.

Note: Users can't finalize or mark the project as **Complete** if there are still files checked out by users.

Results

The project now has the **Complete** status. The Project Manager can retrieve the translated files from the project folder. By default, the project path is `C://Users/USERNAME/Documents/Studio 2017/Projects`. Users can also choose to no longer list the project from within SDL Trados Studio, by right-clicking the project and selecting **Remove from list**.



Additional details

Browser compatibility

SDL Trados GroupShare Cloud is compatible with the latest versions of Internet Explorer, Safari, Firefox, and Chrome.

Support services

SDL Trados GroupShare Cloud support service is available via your SDL account.

Supported SDL Trados Studio versions

SDL Trados GroupShare Cloud supports the following SDL Trados Studio versions: SDL Trados Studio 2015 and SDL Trados Studio 2017.

Help resources

More advanced technical requirements/topics can be consulted in the [online help](#).

Want to see a demo?

Just click here! <https://sdl.webex.com/sdl/lr.php?RCID=2cabb931dc2fb848668210666b3e9a40>.