

# SDL Trados GroupShare Cloud

**Quick Start Guide** 

**SDL\*** Trados GroupShare



## SDL\*

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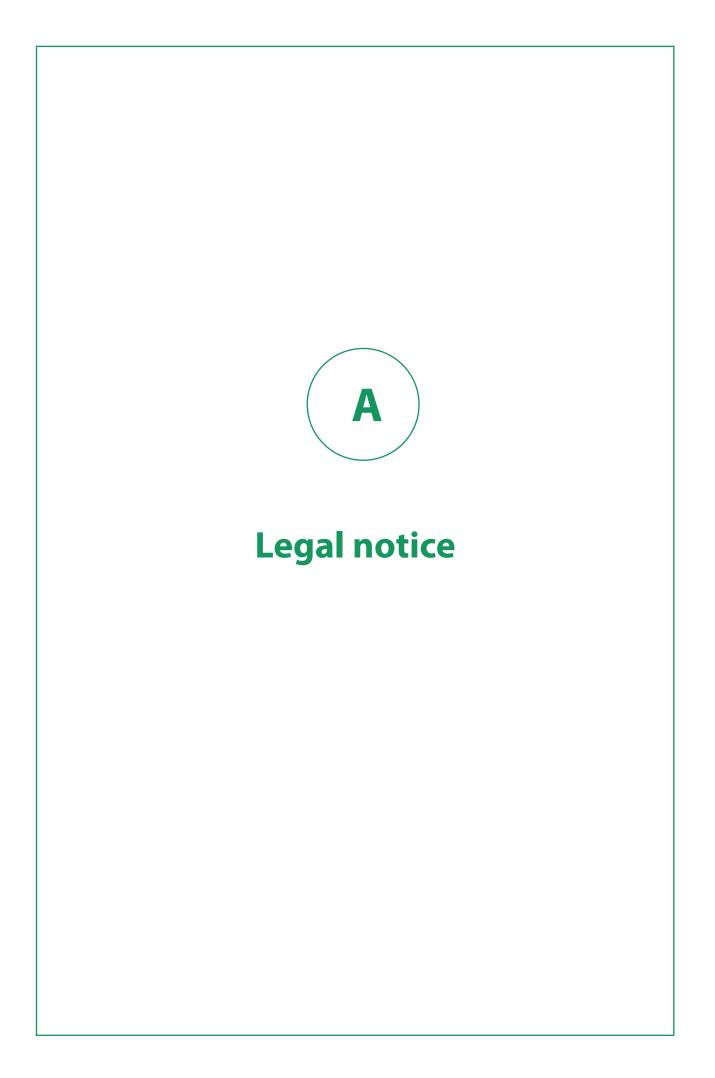
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# **SDL**\* SDL Trados GroupShare QuickStart Guide

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ii SDL Trados GroupShare QuickStart Guide





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# Contents

1	Legal notice	3
2	Welcome to SDL Trados GroupShare Cloud	1
3	Log in	3
$\bigcirc$	Logging in to SDL Trados GroupShare Cloud	4
	Change your password from SDL Trados GroupShare Cloud	4
	Connecting to SDL Trados GroupShare Cloud from SDL Trados Studio	5
	Change your password from SDL Trados Studio	6
4	Dashboard	7
5	Organizations, Users and Roles	9
<u> </u>	Organizations and Sub-Organizations	10
	Add Organizations	11
	Users	12
	Roles	12
	Add users and assign user roles	13
6	Server-based TMs	15
	Configure server-based TMs in SDL Trados GroupShare Cloud	16
	Step 1: Add containers	16
	Step 2: Create server-based TMs	17
	Migrate file-based TMs from SDL Trados Studio	19
	Step 1: Establish your connection to SDL Trados GroupShare Cloud	19
	Step 2: Upgrade your file-based TMs to SDL Trados GroupShare Cloud	19
	Link resources across Organizations	21
	Server-based TMs in SDL Trados Studio	22
7	Server-based termbases	23
	Integration with SDL MultiTerm Desktop	24
	Convert term lists to TBs	24
	Gathering requirements from file-based TBs	25
	Connect to SDL MultiTerm Administrator	28
	Convert file-based TBs to server-based TBs	30
	Create server-based TBs from scratch	36

SDL MultiTerm user roles	9
Server-based TBs in SDL Trados Studio	С
8 Server-based projects	1
View server-based projects in SDL Trados GroupShare Cloud	2
Create server-based projects from the SDL Trados GroupShare Cloud workflow $\ldots$ 42	2
Step 1: Add the project template	3
Step 2: Create projects from within SDL Trados GroupShare Cloud	3
Step 3: Plan work on assignments	4
Step 4: Complete task assignments in SDL Trados Studio	5
Step 5: Change project status to Complete	5
Viewing server-based projects in SDL Trados Studio	б
Create server-based projects using the SDL Trados Studio workflow 40	б
Step 1: Publish projects to SDL Trados GroupShare	7
Publish new projects to SDL Trados GroupShare Cloud	
Publish existing projects to SDL Trados GroupShare 52	
Step 2: Assign files to users	3
Step 3: Change the active file phase	4
Step 4: Work on task assignments	5
Step 5: Advance assignments to the next phase	5
Step 6: Change project status to Complete	5
<b>9</b> Additional details	9





# 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:

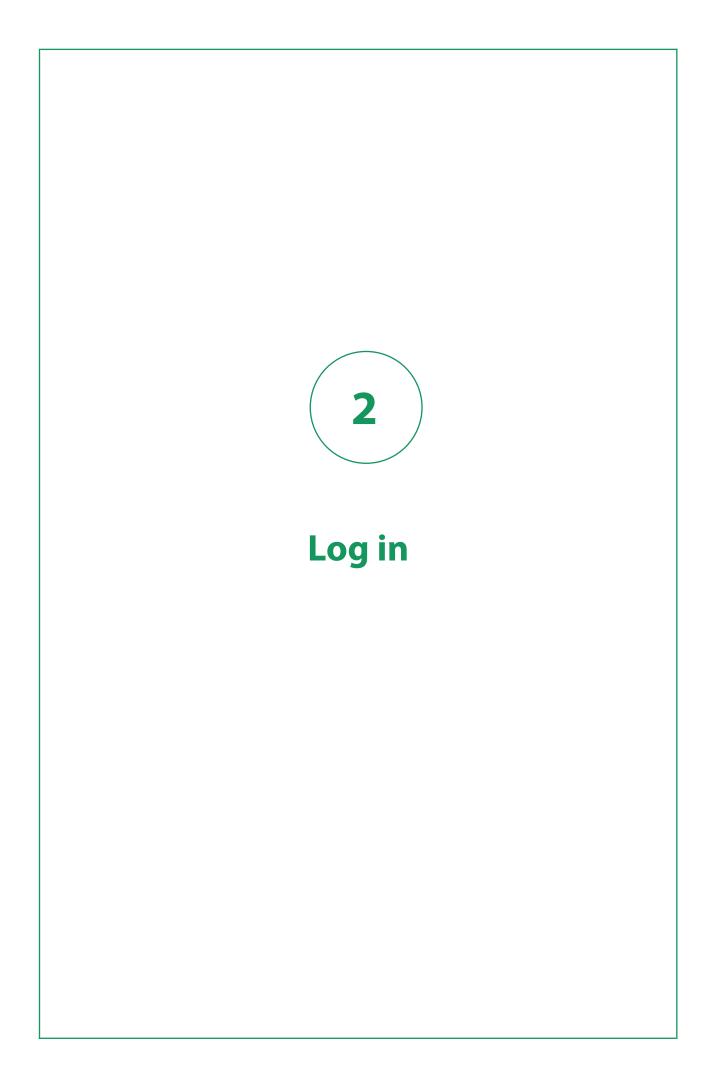
- 1. Log in
- 2. Dashboard
- 3. Organizations, Users and Roles
- 4. Server-based translation memories (TMs)
- 5. Server-based termbases (TBs)
- 6. Server based projects

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 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 .



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**. × Servers × K Add... Betdt... Belete Berler Availability R Clear Stored Credentials Be Change Password
- 4. In the **Add SDL Server** dialog, enter the server address and your SDL Trados GroupShare Cloud credentials.

Add SDL Server
Server Address:
Port: 443
The server requires a secure connection (SSL)
Authentication
O Use Windows authentication (current user)
Authenticate with a different user
Use SDL authentication
User name:
Password:
✓ Do not prompt me again
OK Cancel Help

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

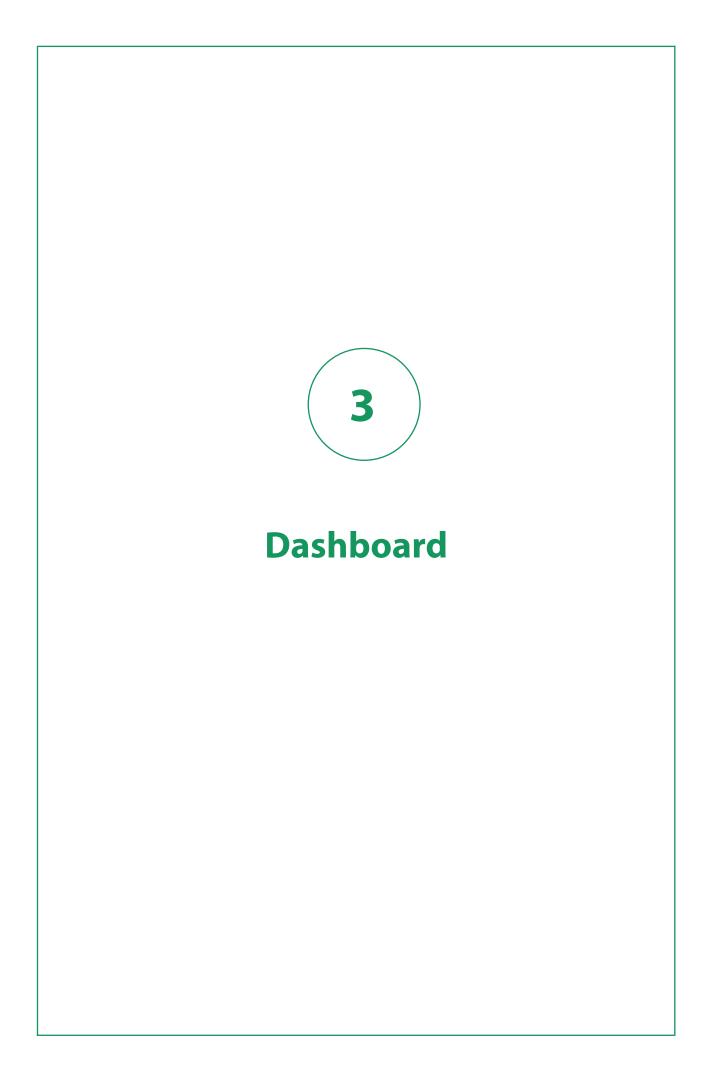
Servers			×
🛃 Add 🛃 Edit 🛃 Delete	📮 Check Server Availability	🙀 Clear Stored Credentials	🔚 Change Password
Name	Status		
Name https://cloud.sdlgroupshare.com/			
	Artaliable.		
			Close
		L	1 holp

# 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.
  Servers
  Add... B Edit... R Delete Check Server Availability R Clear Stored Credentials Change Password
- 3. Change your password and confirm it.



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.

SDL* Trados GroupShare	Dashboard Projects	Resources Users	System Configuration					0 🔺
SA Hello, System Ad								
Deliveries Due Soon 22 PROJECT LANGUAG Testing projects fibered by	<b>-</b> s	ILIVERY BY ~	Your Tasks 2 File SamplePhotoPrinterdoc solvitf	> DUE BY ~	Downloads ( Setting up print Printer price list	ters - 2/22/2017 12:56.0	Statistics     Organizations     Users	4
Project Server comp	e all projects	13 days ago	SamplePhotoPrinter.doc.sdleiff				A Translation Memories	17 40 5 30913
Projects created per month	Dess Just Past Ages	<u> </u>	Words per month	2417 10477 A417 Jun17	Top Language	Pairs Diam en Strahkt en UShor BD ussee DE	Words per Organization	offert QA

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.



# **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.

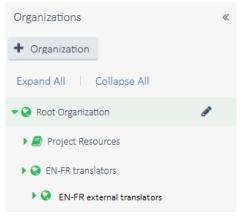
Before you start creating **Users** it is important to understand how SDL Trados GroupShare Cloud works. Therefore, we will briefly explain two main concepts of SDL Trados GroupShare Cloud: **Organizations** and **Roles**.

## **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.

Organizations	*
+ Organization	

4. In the Add Organization dialog:

Add Organizatio	on		
Name *	Enter a name		
Description	Enter a description		
	Is Library		
	Finis	h	Cancel

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

4

## 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 > <u>Standard roles and permissions</u> 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 you 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.

SDL*Trados GroupShare	Dushbo	sard Projects Resources Users	System Configuration			0 4
Users Permissions Content						
Organizations + Organization		Search 7 people and groups   Refresh	Q.			+ New Use
Expand All   Collapse All		NME *	USERGINE	EMAIL ACCRESS	PHONE NUMBER	
Q Root Organization	1	🗆 😑 HultTerm Goest User	p.est.			
Project Resources     Out to enableses		🗆 🕥 Multilieren Super Uner	upe			
<ul> <li>Di-FR estavral burdation</li> </ul>		🗆 😒 System Administrator	9			
		🗆 😗 Dart 1	testuser			
		🗆 😋 User 2	162.68/2			

- 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.

Contact Information	Contact Informati	on	
Roles	Organization *	Root Organization	\$
	User Type *	SDL	\$
	Display Name *		
	Username *		
	Password *		
	Confirm Password *	Confirm your password	
	Email		
	Phone		
	Description	Enter a description	

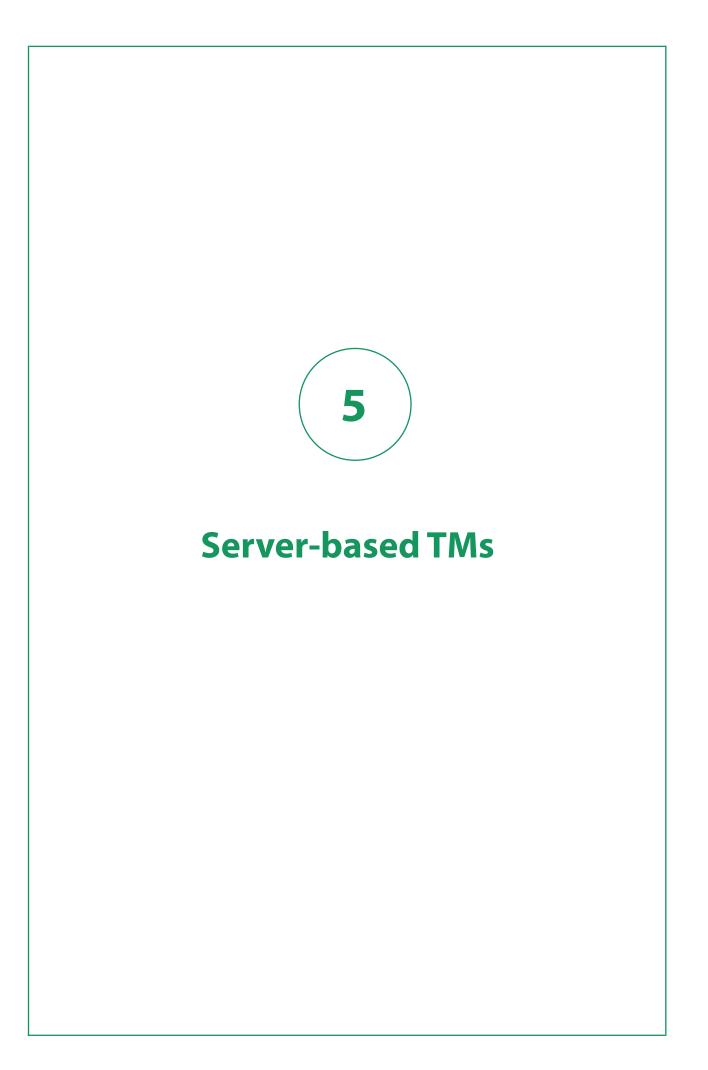
Note: Remember that the User Type must be SDL, and that the Username must be the user's email address.

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

reate User			
Contact Information	Roles		
Roles	ORGANIZATION	ROLES	
	Select	◆ Select	<b>±</b> +
	Root Organization		
	Subsidariy 2 to Root		
	EN-FR translators		
		R	

6. 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.



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

3.

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

				0
			ĺ	+ New Con
<b>tainer</b> dialog:				
Post Organization	•			
	•			
ccsqlserver2	\$			
Enter a name				
Enter a description				
Enter a Database Name				
	inter a name	Root Organization $\diamondsuit$ ccsqlserver2 $\diamondsuit$ Enter a name	Root Organization	Root Organization $\diamondsuit$ tocsqlserver2 $\diamondsuit$

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

3.

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

the <b>Gener</b> e Translation Mem	_			
eneral Settings	General Settir	ngs		
anguage Pairs	Name *	Enter a name		
elds	Description	Enter a description		
anguage Resources	Copyright	Enter a copyright	]	
dvanced Settings	Location *	Root Organization	¢	
ummary	Container *	cc-gs-int01	\$	

- 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 Memor	у		
	Language Pairs		
<ul> <li>Language Pairs</li> </ul>	SOURCE LANGUAGE	TARGET LANGUAGE	
Fields	Select source language	Select target language	+
Language Resources			
Advanced Settings			
Summary			

- 6. Select Next.
- 7. Optionally, on the **Fields** page, do any of the following:

Create Translation Memo	irγ			
	Fields			
	Use Template	Select Field Tem	plate	Unlink
• Fields	FIELD NAME	TYPE	VALUES	
Language Resources	Start typing	Select		Û
Advanced Settings				
Summary				

- 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.

County Translation Man

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

	Language Resour	ces				
	Use Template	Select Langu	age Resources Ter	nplate	\$	Unlink
	SOURCE LANGUAGE	ABBR.	ORDINALS	SEGMENTATI	VARIABLES	
Language Resources						
Advanced Settings						

- 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.

eate Translation Mem							
	Advanced Settings						
	Recognize						
	🛃 Dates	Times	Vumbers				
	Acronyms	Variables	Measurements				
	Alphanumeric strings						
	Count as one if words						
<ul> <li>Advanced Settings</li> </ul>	🖌 Are hyphenated	Are joined by dashes	🗹 Contains apostrophes				
Summary	Contain formatting ta	gs					
	Enable character-based concordance search						
	Performance Accuracy		s s				

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 serverbased 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 Add File-based TMs from Folder... + Add File-based TMs... 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 t	he input translation memories.
Create output translation memory for each input translation memory	
○ Create output translation memory for each language pair	
○ Custom	
Output translation memories:	
BI ENG-FR TM	
BI 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:

		Upgrad	de Translation	Memories				>
Output Translation Memories Settings Specify a location for every output transl	lation memory and review	the settings	. Click Finish to sta	irt creating the	translatio	n memories.		3
Output Translation Memories:	ENG-FR	TM (3)						
B ENG-FR TM (3)	Locati	on Settings	Language Pairs	Compatibility	Fields	Language Resources		
	O Fil	e-based tran	Islation memory					
BI ENG-FR TM.sdltm		Location:	C:\Users\meduma\	Documents\Stu	dio 2017\	Translation Memories		Browse
	() Se	rver-based tr	ranslation memory					
		Server:					~	Servers
		Location:	(None)					Browse
		Container:	(None)					Browse

- a. Choose a server from the **Server:** list.
- b. 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.
- c. Browse for a container for your TM.

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

7. 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

- 1. In SDL Trados GroupShare Cloud, go to the **Users** view and select the **Contents** tab.
- 2. Select the organization where the resource (container + TM; TB) is located.
- 3. 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.

- 4. Click Link Resource.
- 5. 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.

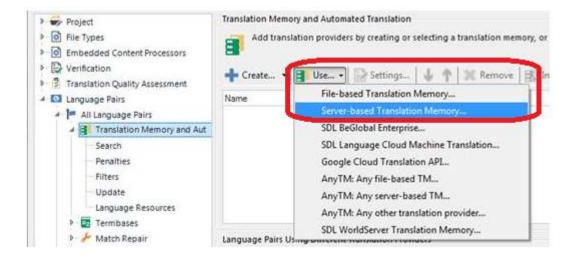
#### 6. Click Finish.

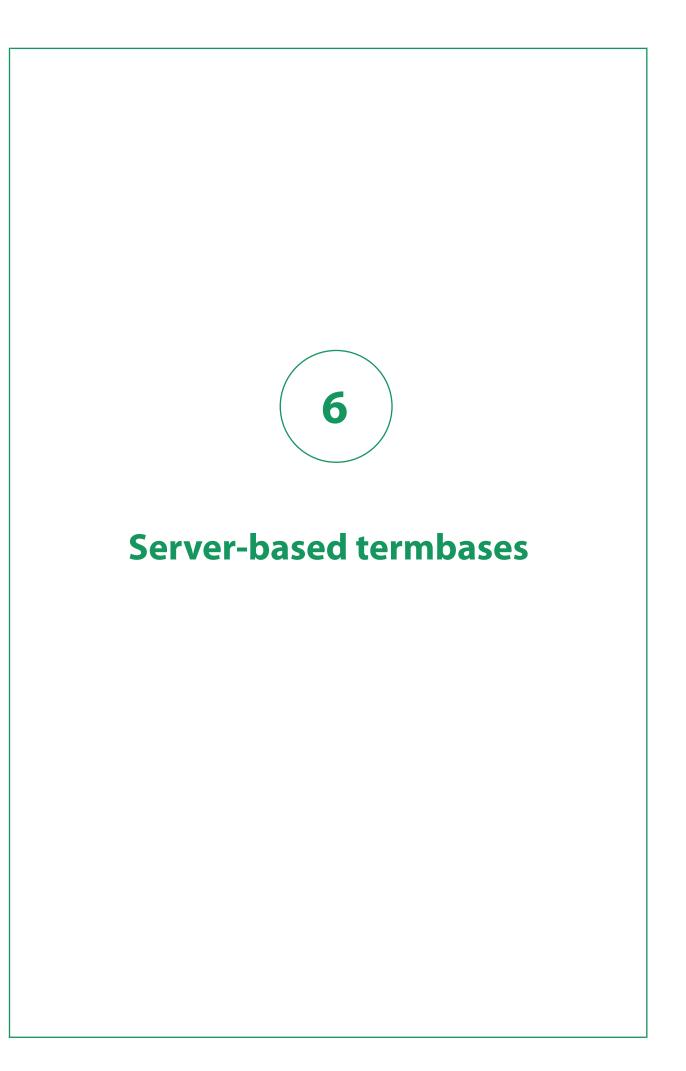
Search 4 conte	ent resources Q		
2 Refresh	➔ Mave Resource % Link Resource % Unlink Resource		
NAME ^	DESCRIPTION	LINKED FROM	▼ TYPE
🖌 👔 Exam	ple Server TM_Mult	Root Organization	translation n
🗆 🖬 Group	Share Server Term	Root Organization	termbase
🗆 🔳 SDLTr	adosGS2017	Root Organization	TM DB serve
🗹 🗊 SDLTr	adosGS2017 Contai	Root Organization	TM containe

**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.





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 Multi-Term Desktop, which supports users in their terminology work.

A termbase consists of:

- An \*xml file = term-related data
- An \*xtd file = termbase definition

The \*xml and\*xtd 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:

Download App	×
Some apps have different versions depending on the software that you are running. Please choose a version of the app from the drop down list.	
<ul> <li>✓ 4.7.6320</li> <li>✓ I agree to be bound by SDL AppStore Terms and Conditions</li> </ul>	*
Please note that in some cases you may be redirected to a website of the third party app provider.	2
Cancel	inue

a. Select a version.

6

- 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.

😸 Glossary Conve	rter - InstallShield Wizard	×
2	Welcome to the InstallShield Wizard for Glossary Converter	
	The InstallShield(R) Wizard will install Glossary Converter on your computer. To continue, dick Next.	
	This installer will replace an existing older version of Glossary Converter	10
	< Back Next > Cancel	

- 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.

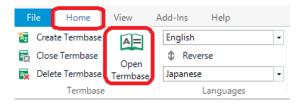
### Procedure

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

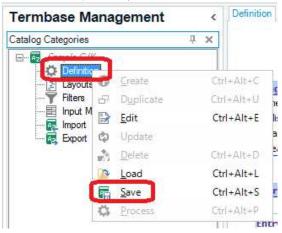


2. On the Home tab, click Open Termbase.

### 6 ) Server-based termbases



3. 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.



4. 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.

Termbase Management		<	Export					
Catalog Categories	џ	×	Name	_	Active	Owner	Desc	riptio
Cample C/K     Sample C/K     Orlinion     Orlinion     Vers     Fites     Fites     Fites     Fites     Fites     Fites     Fites     Fites     Fites			Tab-delimited expo List (spell check, TBX (LISA 2002)	Y	Activate <u>C</u> reate <u>Duplicate</u> <u>E</u> dit Update <u>D</u> elete <u>L</u> oad <u>S</u> ave <u>P</u> rocess	Ctrl+ Ctrl+ Ctrl+ Ctrl+ Ctrl+ Ctrl+	Alt+A Alt+C Alt+U Alt+E Alt+D Alt+L Alt+S Alt+P	rts a 3 al 3 s 3 th 3 al 6 at

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

	Export Wizard - Step 2 of 8	?
Export Settings		
elect the export file and choose to sort tembase conte e drop-down list.	ent by entry number or by language index. If you wish to apply a filter during	export, select one
For a complete backup of your tembase, select Sort i	tembase content by entry number.	
Export file:		
		Save As
Log file:		
		Save As
_		
Sort tembase content by entry number		
Sort tembase content by entry number     Sort tembase content by language field:		
	~	
Sort tembase content by language field:	v	
Sort tembase content by language field:	v	
Sort tembase content by language field:	v	
Sort tembase content by language field: Source	~	
Source Apply filter:		
Source Apply filter:		

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

Organize 🔻 New fold								0
🔆 Favorites	Name	Da	te modified	Туре	Size			
E Desktop	퉬 Samples	7/1	18/2017 4:57 PM	File folder				
🗼 Downloads	鷆 Termbases	7/1	18/2017 4:57 PM	File folder				
🔛 Recent places								
💻 This PC								
🗣 Network								
File <u>n</u> ame: MyS	ample							¥
Save as type: XML	File:(*.xml)							~
Hide Folders					0	<u>S</u> ave	Cancel	

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

Export Wizard - Step 8 of 8
Processing the Export MultiTem is exporting content from the tembase to the export file. Click Next when the export is complete.
Exporting terms
100%
< Back Next > Cancel Help

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

	Export Wizard	?	×
	Wizard Complete		
SDL*	The Export Wizard is complete. Click Help to find out how to use the export definition to export content from your tembase if you have n already done so. Click Finish to close the Export Wizard.	ot	<b>*</b>
	< Back Finish	Help	]

# **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.

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${}^{}$		
<u>O</u> pen Termbase	Ctrl+O	
<u>C</u> lose Termbase	Ctrl+Alt+B	S <u>e</u> rvers Ctrl+Shift+E
New		Manage User Profiles
Import & Export		
Settings Template		
Print		
Set <u>u</u> p		
<u>V</u> iew Log File		
Op <u>t</u> ions		
E <u>x</u> it		

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



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

Add SDL Server
Server Address:
Port: 443
The server requires a secure connection (SSL)
Authentication
O Use Windows authentication (current user)
Authenticate with a different user
Use SDL authentication
User name:
Password:
✓ Do not prompt me again
OK Cancel Help

- 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.

Brow ≟≕ Hitlist 🗊 Term
******
Az Terms
🙀 Termbase Management
🛔 Administrator

# **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.

	Termbase Wizard	×
SDĽ*	Termbase Wizard Use this wizard to create a new tembase or to modify an existing tembase.  2. Specify a name for your tembase addinition for your tembase. 2. Specify a name for your tembase addinition for your tembase. 2. Specify a name for your tembase addinition for your tembase. 2. Define the structure of entries in your temb	
	Next >>> Cancel Help	

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.

	Termbase Definition
	Specify whether you wish to create a tembase definition using one of the predefined tembase templates, loa an existing tembase definition or create a new tembase definition from scratch.
	O Create a new tembase definition from scratch
	O Use a predefined tembase template
	Bilingual glossary
	Load an existing tembase definition file  Browse
	O Use an existing termbase as a template
CDI*	Browse
SDL*	

**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:

	Termbase Wizard - Step 2 of 5
	Termbase Name
	Enter the termbase name and a description, if required.
	Friendly Name:
	Description (optional):
	~
	v
	Qrganization:
	Copyright (optional):
SDL*	
	Add more
	<back next=""> Cancel Help</back>
	< pack Next > Cancel Help

- 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**.

Languages:		Selected lang	uage fields:	
Afer Show sublanguages	Add >> << Remove	DE EN	German English	
Sort order Case-sensitive Ignore non-alphabetic characters		Language fiel	d label:	

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.

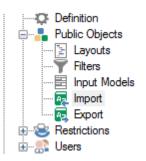
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Field tabel:   Description (optional):	Descriptive fields:       Subject       Note       Source       Statua       Definition       Context       <<       <       <                         Statua       Definition       Context	
--	--	--

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.

Entry structure:		Available descriptive fields:	
Cortex     Cortex     Source     Source     Source     Subset     Subset     Subset     Source     Subset     Subset     Source     Subset     Source     Subset     Source     Subset     Source     Source     Subset	<< Add Remove >>	Context Definition Note Source Statue Subject	
	Field settings Mandatory Multiple		

- 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**.

ck Browse to select the import file (XI	ML) and the import log file below. If you wish to filter the contents of the import file, select a filter from	the drop-do
Import file:		ro <u>w</u> se
Log file:		
	Sa	ive As
East import (import file is fully comp	sliant with MultiTerm XMI.)	
East import (import file is fully comp Perform full reorganization after imp		
Perform full reorganization after imp		
Perform full reorganization after imp	port	
Perform full reorganization after imp	port	
Perform full reorganization after imp	port	
Perform full reorganization after imp	port	

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

<u> </u>		Open		
🛞 🤿 = 🕇 📕 «	Local Disk (C:) → Users → meduma	▶ Documents      ▶ SDL      ▶ SDL MultiTerm	✓ 🖒 Search SDL MultiTerm	,p
Organize 🔻 New fo	lder		) <b>•</b> I	0
<ul> <li>★ Favorites</li> <li>■ Desktop</li> <li>&gt; Downloads</li> <li>&gt; Recent places</li> <li>&gt; Recent places</li> <li>&gt; This PC</li> <li>A Network</li> </ul>	Name  Samples Tembases MySample	Date modified         Type           7/19/2017 556 AM         File folder           7/19/2017 541 AM         File folder           7/18/2017 541 AM         File folder           7/18/2017 542 PM         XML Document	Size 115 KB	
File	: name:		V XIML Files (*.xml)	v ncel

- 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.

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Import Wizard - Step 3 of 8	
/alidation Settings pecify an exclusion file for invalid (incomplete or over-complete) entries and decide how such entries should be processed during the import.	
Exclusion file:	)
Allow incomplete entries	
Allow over-complete entries	
Ignore sublanguages	
< Back Next > Cancel Help	]

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

<u>u</u>			Save As					-
🔄 🏵 - 🕇 🎽 «	Local Disk (C:) > Users	→ meduma → Documents	s → SDL → SDL Multi	Term →	~ ¢	Search SDL MultiTerm	1	P
Organize 👻 New fo	older					100	≡ •	0
Favorites     Desktop     Downloads     Recent places     This PC	Name	÷	Date modified 7/19/2017 9:56 AM 7/19/2017 9:41 AM	Type File folder File folder	Size			
🛛 🖣 Network								
	clusion_file_name							~ ~
Hide Folders						Save	Cancel	

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

_				
Summary: Import definition name:				
Import log file:C:\Users\ Fast import: false Full reorganization: false	duma\Documents\SDL\SDL meduma\Documents\SDL\; ; meduma\Documents\SDL\;	SDL MultiTerm\test.log	n_file xcl	

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

Import Wizard - Step 8 of 8	×
Processing the Import	
33 entries processed. 100%	
100%	_
<back next=""> Cancel Hei</back>	p

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.

6

	Termbase Wizard - Step 1 of 5	×
	Termbase Definition Specify whether you wish to create a tembase definition using one of the predefined tembase templates, load an existing tembase definition or create a new tembase definition from scratch.	
	● Greate a new termbase definition from scratch	
	O Use a predefined template	
	O Load an existing tembase definition file	
SDL*	O Use an existing tembase as a template Browse Copy catalog objects to the new tembase	
	< <u>B</u> ack Next > Cancel Help	

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

	Termbase Wizard - Step 2 of 5	×
	Termbase Name	
	Enter the tembase name and a description, if required.	
	Friendly Name:	_
	<u> </u>	
	Description (optional):	
	Organization:	
	Copyright (optional):	
SDL*		
SDC	Add more	
		_
	< <u>B</u> ack Next > Cancel Help	

- 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**.

ect the languages you wish to include in you	ir termbase. Accept the default in	dex field label fo	r each language or customise it to suit your req	uireme
Languages:		Selected lang	juage fields:	
Chinese Show sublanguages	Add >> <th>ES FR ZH</th> <th>Spanish French Ohnese</th> <th></th>	ES FR ZH	Spanish French Ohnese	
Sort order		Language fie	d label:	

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

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

ield label:		Descriptive fields:
Description (optional):	Properties - Status	
	Data type: Picklist  Picklist:	<u>n</u>
	Approved Forbidden Pending Approval	

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

6. 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).

y structure:		Available descriptive fields:
Frity level     Index level     For Revel     Source		Context Definition Note Source Status Subject
Status  Status  Solution  Solution	<< Add Remove >>	
™igi staus	Field settings	

**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.

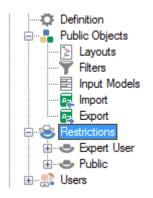
7. On the last page of the **Termbase Wizard**, click **Finish**.

## **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.

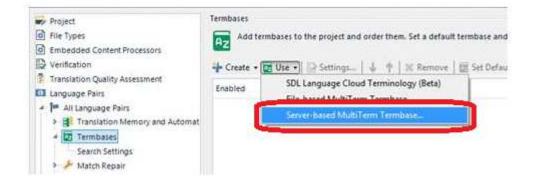
Users get access to server-based termbases based on the roles assigned to them in SDL MultiTerm Administrator. By large, users automatically gain read-only access rights to termbases, as part of the privileges associated to translators or external users for example.

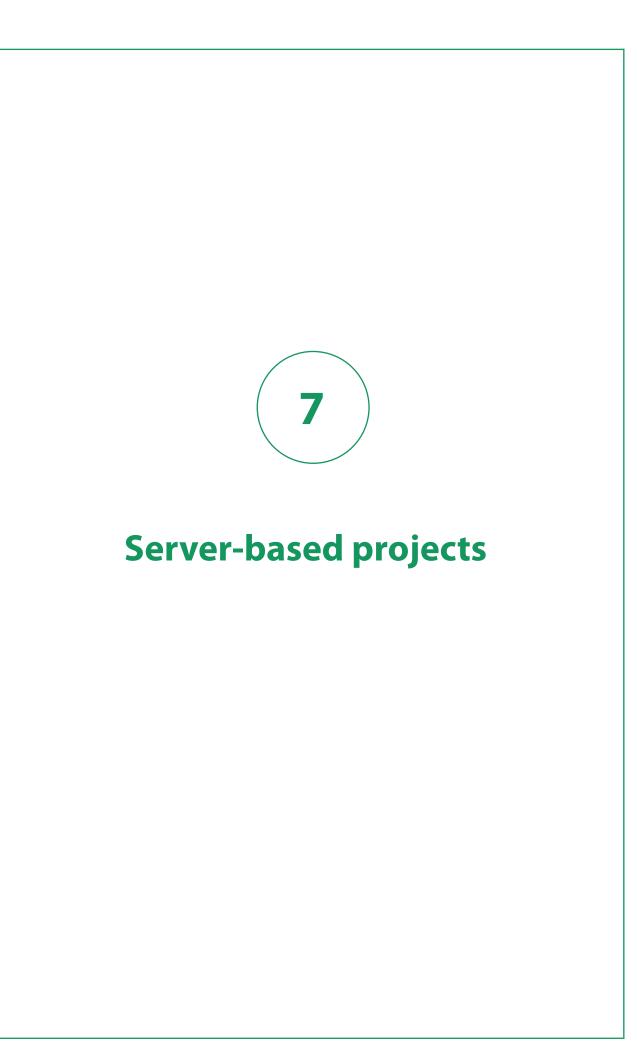
Administrators must consult the privileges or rights associated to user roles (*Expert User* and *Public*), and decide where termbases are placed within SDL Trados GroupShare Organizations for restricted access. Administrators can also customize the restrictions they may wish to impose on users.



# 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.





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.

the <b>New F</b>	Project Template window:		<u>+</u> N
New Project Te	· · · · ·		
Name *	Enter a template name		
Description	Enter a description		
Location *	Select a location		\$
Template File *	Project template file (.sdltpl)	Browse	
	io to create a project template (.sdltpl) that you can u	use to create new projects.	

- 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.

New Project Follow the steps below t	o create a new translation project.		
Name *	Enter a name		
Description	Enter a description		
Location *	Root Organization	\$	
Template *	Select a template	\$	
Project File *	Zip archive, translatable and reference file	Browse	
Delivery Date	🛗 at 🗘		

- 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.

	Project 1 Project 10 PD/sdt24-bd55-464e-9057-e24e89800ef1 Owened by System Administrator on Wed, Feb. 08, 2017 10:32 - 2 File(s) Rock Organization.		0	REMARKS 2000 REMARKS DA
	S Refresh 🚯 Download all files 🛱 Flanning		Estimated pro	ect progress is 1%
				-
	Preparation 💼	Translation 🚺	Review	Tituliation 🕐
	11.5	71.05	1125	n.15
	A Sample/PhotoPrintec.doc.adbdff  Checked out on: Wed. Feb. 08, 2017 10 25			

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

Preparation 1	Translation	Review 1	Finalisation 🔳
Delivery at:	Delivery at: Sun, Jul. 23, 2017 17:21	Delivery at: Wed, Jul. 26, 2017 17:21	Delivery at: Mon, Jul. 31, 2017 17:21
Assigned users	Assigned users	Assigned users	Assigned users
+ Add 🛛 🗢	+ Add •	+ Add 🔹	+ Add •
Project Manager (project man 🛛	🕫 External Translator (external tr 🛛	Specialised Reviewer (specialis	Head of Department (head of 0

- 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.

2 Refresh	🕈 Delete 🗸 Mark	as Completed	
PROJECT			PUBLISHED A
ECDC sample	2		Wed, May. 31

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

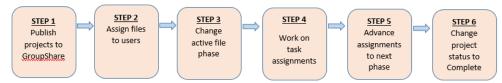
# **Create server-based projects using the SDL Trados Studio workflow**

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.

New Project		×
Project Type Specify whether to create a project based on a project template or whether to create a project based on a previous proj	ect.	
Icreate a project based on a project template	_	
Default	<ul> <li>Brows</li> </ul>	e
Create a project based on a previous project		
Sample Project	▼ Brows	e
Help < Back Next > Finis	ih Can	tel

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

	New Project	- 🗆 🗙
Project De Please	iails specify a project name and location, and optionally specify a project description, number, customer and due date.	**
Name:	Project 1	
Description:		^
ocation:	C:\Users\meduma\Documents\Studio 2017\Projects\Project 1	Browse
	Allow source editing	
	Disable merging segments across paragraphs	
	Users assigned on a project package must run verification before returning the package	
Publish	project on Trados GroupShare	
Publish Server:	project on Trados GroupShare <click a="" add="" button="" on="" server="" servers'="" the="" to=""></click>	Servers
_		Servers Browse
Server	<click 'servers'="" a="" add="" button="" on="" server="" the="" to=""> v (None)</click>	
Server: Location:	<click 'servers'="" a="" add="" button="" on="" server="" the="" to=""> v (None)</click>	Browse
Server:	<click 'servers'="" a="" add="" button="" on="" server="" the="" to=""> v (None) About Trac</click>	Browse

#### a. Choose a server.

	Publish Project	-	□ ×
	Project Details ify the server to which you want to publish the project and the location of the project within the organizational hiera	rchy.	3
Server:	<click 'servers'="" a="" add="" button="" on="" server="" the="" to=""></click>	S	iervers
Location:	(None)	В	rowse
		_	

- 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.

Project Languages Select a project source language and 1	or more project targe	t languages.			
Source Language					
English (United States)	v				
Target Languages					
Available:			Selected:		
Albanian (Kosovo)	<u></u>	Add >			
Arabic (Chad)		< Remove			
All Languages		Remove All			
Afar (Djibouti)					
Afar (Eritrea)					
Afar (Ethiopia)					
Afrikaans (Namibia)					
Afrikaans (South Africa)					
Aghem (Cameroon)					
Akan (Ghana)					
Albanian (Albania)	~				
C	>				

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

	New Project		- 🗆 🗙	
Planning and Assignments Plan work and assign it to Trados GroupShare serve	users.		***	
anning and Assignments		~ ~	_	
Preparation	Review	Finalisati	on	
Target Language 🛛 💥 English (United Kingdom)	* Due date	Select a date 15	Enter time 🚔 👻	
Available Assignees	Sel	ected Assignees		
Type to filter	Add > If	you do not assign a user, this task v	will be assigned to you	
All Users	< Remove by	by default.		
MultiTerm Guest User MultiTerm Super User System Administrator				
Help		< Back Next >	Finish Cancel	

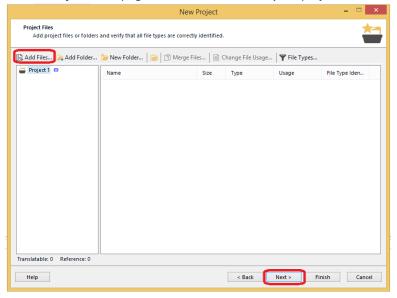
- a. Under **Due date**, choose an end date and time for the assignments in this stage.
- b. Optionally, under **Available Assignees**, type a user name, especially if you have a large user list and you want to retrieve them fast.
- c. Under **All Users**, select the user you want to add to the project 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).

	New Project 🚽 🗖	×
Translation Memory and Autor Select translation memories	mated Translation s and automated translation servers for the language pairs selected in the project.	***
All Language Pairs     Translation Memory and     Search     Penalties     Filters     Update     Language Resources     Match Repair     English (United States)-> Engl	Translation Memory and Automated Translation         Add translation providers by creating or selecting a translation memory, or connecting to automa translation services.         Add translation providers by creating or selecting a translation memory, or connecting to automa translation services.         Create       Import         Create       Import         Create       Import         Language Pairs Using Different Translation Providers         The following language pairs do not use the translation providers listed under All Language Pairs. Reviet the list as required.         Name       Enabled Lookup Penalty Concordance	ww
		Þ
Help	< Back Next> Finish Ca	ancel

**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.

	New	r Project – 🗆 🗙							
Termbases Add termbases to the project and order them. Set a default termbase and check the language mapping.									
🏪 Create 👻 💀 Use 👻	🗟 Settings   ↓ ↑   🗶 Remove   🖻 Settings	et Default							
Enabled	Termbase	Filter							
Languages: Project Language		Termbase Language							
English (United Ki	ngdom)	(Not specified)							
English (United St	ates)	(Not specified)							
Help		< Back Next > Finish Cancel							

**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.

New Project	- 🗆 🗙
Preparing Project Please wait while the project is being prepared.	**
Convert to Translatable Format     O copy to Target Languages     Apply PerfectMatch     Pre-translate Files     Analyze Files     Schedue Project To Publication     Publish Project Project 1     Assigning users to Project 1	Errors: 0, Warnings: 0 Errors: 0, Warnings: 0
Help < Bac	k Next > Close Cancel

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	Туре
📛 Sample Project	Studio project
noupShare 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.

Status: Show all projects		~										
Filter Projects			Sample	e Pro	ject	- h	Progress	[none]		7/19/20111	0:35:45	Studio projec
Projects		<	Name				Status	Due Dat	e	Created At	Ŧ	Туре
Configuration					Tasks					Tra	ados Grou	ipShare
Settings	Project	Project	Batch Tasks •	<b>-</b> *	Remove from List	10	Create Project	Template	Folder	Publish Project		
Project	New	Open	Batch	<b>10</b>	Set as Active	÷.	Revert to In Pro	ogress	Open Project	Publish	Open	Unpublish
	<b>*</b> *	<u> </u>	٠	Đ	View Project Files	-	Mark as Compl	ete		(2)		G
File Home	Viev	v Ad	d-Ins	Hel	p							

**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**.

Project type

Projects	
Filter Projects Status	
Show all projects	
Due date:	
Show all projects	
Type:	260
Show all projects	
Show all projects Standard projects Single file projects Trados GroupShare projects	

#### Results

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

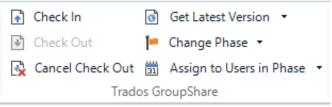
SDL Trados GroupShare Cloud then analyzes the permissions of the users who are members of SDL Trados GroupShare Cloud roles on the server, and makes the project files visible to the appropriate users in SDL Trados Studio. You can use filters to locate the relevant project based on type.

### Step 2: Assign files to users

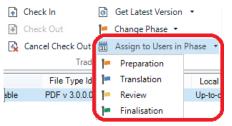
After publishing your project to SDL Trados GroupShare Cloud, you can delegate the translation work to specific users, so that they can start translating or reviewing the project files. When the allocated files reach the phase where the users are assigned to work on them, SDL Trados GroupShare Cloud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

Assign Users to the Preparation Phase											
This dialog allows you to assign the selected users to a specific phase.											
Selected Users:											
Name	Email	Phone	Description								
System Administrator											
Add Remove	Due I	Date: 6/27/20	17 🔍 🛪 5:00:00 PM								
				_							
		ОК	Cancel Help								

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

		5	Select Users		×
Users:					
Name		Email	Phone	Description	<b></b>
AB					
AC					
MultiTerm					
MultiTerm	Supe				
				_	
✓ Show all	users fr	om the Trados (	Group Share server		
✓ Show all	users fr	om the Trados (	Group Share server		

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.

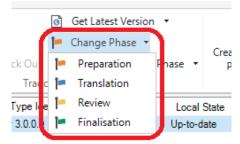
**Note:** If you add or remove assigned users during the current phase, SDL Trados GroupShare Cloud sends an assignment change email.

### 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 A	Review Due Date	Finalisation
W	SecondSample.docx.sdlxliff	(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.sdlxliff	(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
		External Translator	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
		Internal Translator		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
<b>⊖</b> €	Answering_Machine.pdf.s	Specialised Revie	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.

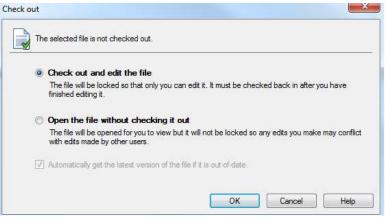
#### Procedure

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.

Open Trados	GroupShare Project	
Project L Pleas	ocation e select the location where you wish the project to be stored locally.	
Location:	C:\Users\Isimplicio\Documents\Studio 2011\Projects\Samples\Sample Project	Browse

**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.

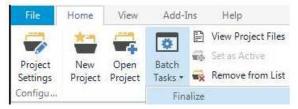
File Projec Setting		e View Open For Translation	Add-Ins Q Open For P Open For	Sign-off	Batch	Explore Containing Folde     Open File Externally     Open File With	Add Folders	Delete Files Change File Usage Revert to SDLXLIFF	<ul> <li>→</li> <li>→</li></ul>	Create Project Package	Create Return Package	File assignment layout	•	Go to las'
Configura	tion		Open			F	le Actions		Trados GroupSh	Pac	ages	Layout		Bookm
> Name				Checked C	ut To	Preparation	Preparation Due Date	Translation	Translation Due	Date Revie	ew 🔺	Review Due Date	Finalisa	ition
	C N	SecondSamp	le.docx.sdlxliff	Project Man	ager	Project Manager 3	/12/2017 18:00:00	LSP	31/12/2017 18:00:0	00 Projec	t Manager	31/12/2017 18:00:00	Project M	lanager
- U	<u>_</u>	SamplePres	entation.pptx	External Tra	nslator	Project Manager 3	/12/2017 18:00:00	External Translator	27/04/2017 10:30:1	00 Specia	lised Reviewer	18/05/2017 09:45:00	Head of D	Department

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 Group-Share 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**.



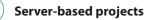
#### Procedure

- 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.

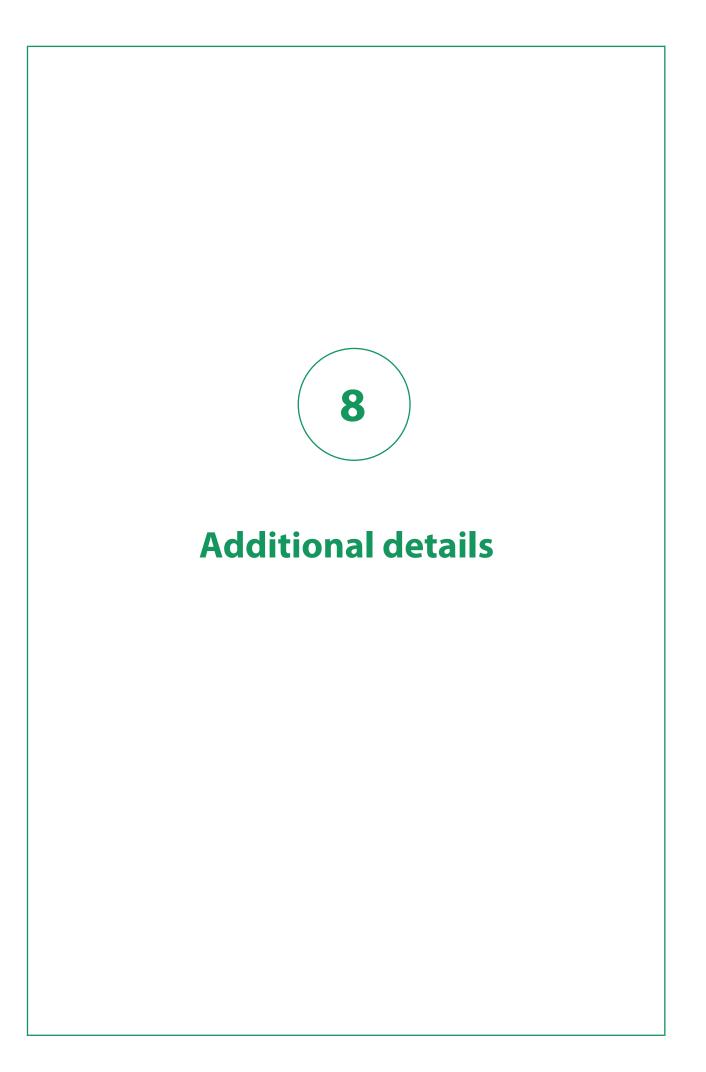
**Note:** Users cant finalize or mark the project as **Complete** if there are still files checked out by users.

#### 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://USETS/USERNAME/Documents/Studio 2017/ Projects. Users can also choose to no longer list the project from within SDL Trados Studio, by rightclicking the project and selecting **Remove from list**.







### **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/lsr.php?RCID=2cabb931dc2fb848668210666b3e9a40.