PARLAM CONNECTOR FOR RWS TRIDION SITES 10

User and configuration guide

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1 Introduction

1.1 What is Parlam

Parlam is the translation management system, or TMS (*Translation Management System*), that your company uses to translate its content. When you connect your content system to Parlam, the texts you need to translate reach Parlam without you having to export them or send them by hand, and the translations go back to where they belong on their own.

Parlam brings together in one place the translation of all your company's content, wherever it comes from: the CMSs, each department's documents and the information from any other system it is connected to. Everything follows the same process and can be checked from one place, so there is no need to chase files by email or ask how far along each job is.

From Parlam, your company decides who translates each thing: an agency, freelance translators, the in-house team or machine translation with artificial intelligence. They can be combined by content type or language, and you don't have to worry about it: the content you send will follow the path that has been defined.

At the heart of Parlam is the translation memory. Every translated sentence is stored, and when it appears again, in the same content or in any other, Parlam reuses it. This has three benefits you will notice right away. The first is cost, because only new or changed text is translated. The second is time, because with less to translate, content reaches each market sooner. The third is consistency, because your company always says things the same way, with the same terminology and the same tone, across all channels and languages.

1.2 What is Parlam Content Hub

Parlam Content Hub is the part of Parlam that talks to your content systems. Parlam manages the translations; Content Hub is what collects the content from your system, hands it to Parlam and, when the translation is ready, returns it to where it came from. Thanks to Content Hub, your system and Parlam work together without anyone having to move files between them.

Content Hub runs in the cloud and is maintained by Parlam, so you don't have to install or look after any server. On your side, you only need to prepare your system so it can communicate with Content Hub. In the case of Tridion, that means installing a small add-on; this guide explains exactly what to do.

It is worth understanding the path the content follows, because it will help you know what is happening at each moment. Everything starts in your system, when someone decides that some content needs translation and sends it. Content Hub receives it and uses it to create a translation project in Parlam. From

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there, the project moves forward following the workflow your company has defined: the translators do their work and, if the workflow calls for it, the reviewers check it. When the translation reaches the **Delivery** phase, Content Hub collects it and loads it back into your system, and then lets Parlam know that the delivery has been completed so the project closes correctly. Content Hub checks every few minutes for finished translations, so you don't have to keep an eye on them.

For all this to work, during the installation you will configure a few pieces in Parlam. You will see them named throughout the guide, so it is a good idea to introduce them now.

The **connector** is the adapter that lets Content Hub understand a specific type of system. Each system stores and organizes its content in its own way, and the connector knows how to read it and how to write the translations back. This guide covers the Tridion Sites 10 connector.

The **workflow** is the set of Parlam rules that decides how the content is translated: who translates and reviews it, which translation memories and glossaries are applied and which delivery deadlines are proposed. The languages are not decided by the workflow, but by the **Working languages** of your Parlam account. It is the first thing you will create, because everything else relies on it.

The **Content Hub profile** is the configuration you create in Parlam for your system. It stores the **Content Hub token**, which is the secret key your system uses to identify itself to Parlam and which you must treat like a password. It also specifies the workflows your system can use and, depending on the connector, the language and user mappings, which are used to translate your system's language codes and usernames into the ones Parlam uses.

Finally, the **connection** is the part of the profile that lives in Content Hub and holds the details for reaching your system. A connection can be **Started** or **Stopped**, and Content Hub only serves your system while it is **Started**. Stopping it is useful when you need to change the configuration calmly or pause the submissions.

1.3 About the Tridion Sites 10 connector

The Tridion Sites 10 connector lets you translate the content of your Tridion Sites 10 Content Manager (formerly SDL Web) with Parlam without leaving Tridion. Parlam, as an RWS partner, provides an add-on that adds the Parlam buttons to Tridion: from there you choose the items you want to translate and the languages, and the translations come back to each language's publications in your BluePrint, ready to review or publish.

1.4 Connector scope

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The connector works on the Tridion **BluePrint**. Your original content is in a **source publication**, written in the source language, and each translation goes to a **target publication**: a child publication of the source one, one per language. The connector reads the content from the source publication and writes each translation to the publication of the corresponding language, as a **localized** copy of the item.

All the work is done from Tridion. The add-on adds a **Translate** option to the content explorer's context menu, a **Parlam Setup** button to its toolbar and a **Parlam Queue** entry to the Tridion header. Who sees each one is decided by two Tridion groups that you create.

What gets translated. In **Parlam Setup**, an administrator creates one or more **setups**. Each setup specifies the source publication and its language, the Parlam workflow to use, the target publications and the language of each one, which item types can be translated (components, pages, folders, structure groups, categories and keywords) and which schemas and which fields contain text to translate, both content fields and **metadata** fields. From each item, the connector reads only those fields, content and metadata, plus its name and, where applicable, its description. The design, the links and the non-text fields are left untouched.

Languages. The target languages are those of each setup's target publications. They must also be in the **Working languages** of your Parlam account.

Projects. An editor selects items in the content explorer and chooses **Translate**. A Parlam window opens with a proposed project: the editor reviews the items, chooses the target languages and the due date, can choose who translates each language, and sends it.

Content path. Within a few minutes, the connector creates a project in Parlam for each Tridion project, with all the chosen languages and the setup's workflow. The project follows the Parlam workflow and, when a language reaches the **Delivery** phase, the connector downloads it and, for each item, localizes it in the target publication if it was not localized yet, checks it out, updates only the translated fields, checks it in and adjusts the rich text links so they point to the target publication. It then confirms the delivery to Parlam.

Multiple translation levels. The connector lets you translate in a chain following your BluePrint. If a target publication has child publications of its own, you can translate, for example, from English to Spanish (EN > ES) and, from that Spanish, to Mexican Spanish (ES > ES-MX). Each level is translated in a separate project: the Mexican Spanish one waits for the Spanish to be delivered and is translated from it, so it takes advantage of what has already been translated at the previous level.

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Publishing. Publishing is optional. With the **publishing profiles** and **publishing rules** you define, the connector publishes the translated items, and the pages or components that use them, to the targets you choose.

Tracking. In **Parlam Queue** you see the projects and the state of each one, and within each project, the phase each language is in. Administrators see all projects; editors see their own and, if they are PMs in Parlam, those of their department, just as in Parlam itself. In Parlam, each project belongs to the Parlam user that corresponds to the Tridion editor who created it.

Updates. When you change an item that was already translated, just send it in a new project. Thanks to the translation memory, the text that has not changed is reused and only the new text is translated.

What the connector does not do. It never modifies your content in the source publication: translations always go to each language's publication. It only changes the fields that are translated; the design, the links and the non-text fields stay as they were. And it never deletes anything in Parlam: if you delete a project from the queue, the project that was already in Parlam carries on.

1.5 Connector components

The connector has two parts: an add-on that is installed in your Tridion Sites and the services hosted and maintained by Parlam.

1.5.1 In Tridion: the Parlam TMS Connector add-on

Parlam TMS Connector is an extension for Tridion **Experience Space**. It is delivered as an add-on package and installed with the Tridion **Add-ons** service. It adds three access points to the Tridion interface:

Access point	Where it appears	Who sees it	What it opens
Translate	In the content explorer's context menu, both in the list and in the tree	Members of the **Parlam Users** group, when the selection is folders, components, structure groups, pages, categories or keywords	The **Parlam Projects** window, to create a translation project with the selected items
Parlam Setup	In the content explorer's toolbar	Members of the **Parlam Admins** group	The **Parlam Setup** window: setups, publishing rules and publishing profiles
Parlam Queue	In the main navigation of the Tridion header	Members of the **Parlam Users** group	The **Parlam Queue** page, embedded in Tridion, with the list of translation projects

The add-on does not store content or talk directly to Parlam. When someone clicks one of its access points, the add-on asks the Parlam connector for a single-use access permission, valid for 60 seconds, and uses it to open the Parlam window, which from then on works with a one-hour session. This way, your Content Hub token never appears in the browser's address bar.

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The add-on needs a small configuration file with the addresses of the Parlam connector, the TCM URIs of the two Parlam groups and your Content Hub token.

1.5.2 Hosted by Parlam: the Content Hub services

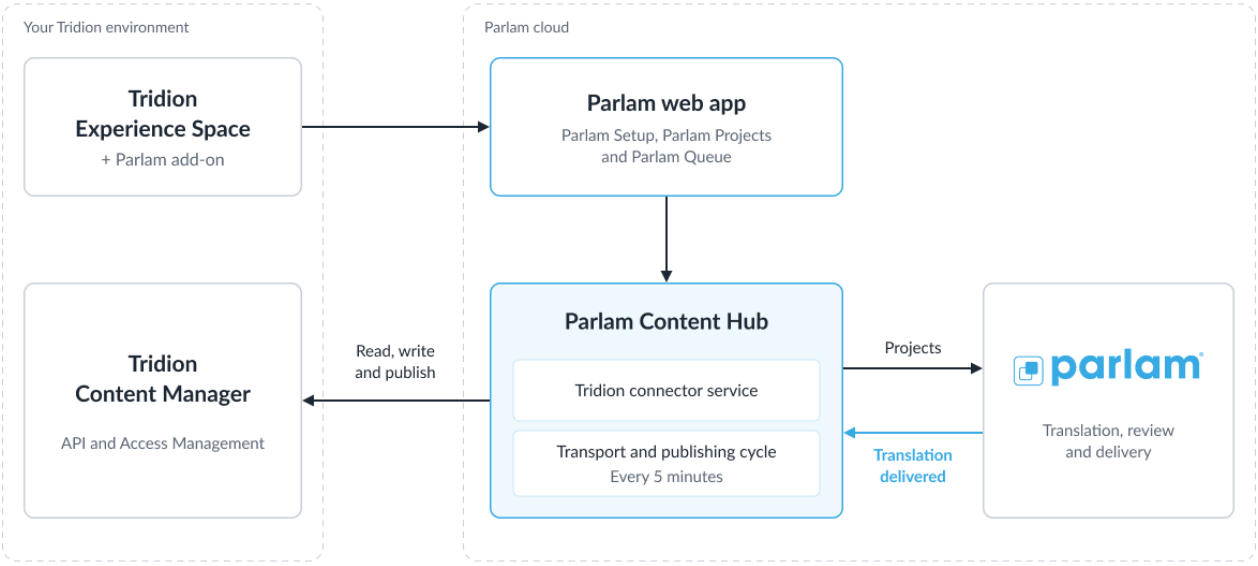
On the Parlam side, several services do the work, and you don't have to install or maintain them.

The screens the add-on opens (**Parlam Setup**, **Parlam Projects** and **Parlam Queue**) are a web application hosted by Parlam and displayed in a window or a frame inside Tridion. Behind them, the Tridion connector service talks to your Content Manager on their behalf, using the OAuth client you specify in the Content Hub profile: it reads the publications, schemas, page templates, items and users from Tridion, stores your setups, your projects and your publishing rules, and checks that each Tridion user belongs to the Parlam groups.

The transport and publishing cycle runs on its own every 5 minutes. It sends the projects that are ready to Parlam, tracks their state, writes the delivered translations to Tridion, publishes them according to your rules and confirms the delivery to Parlam.

All of this happens on behalf of your Parlam account, where your projects are and where the content is translated, reviewed and delivered. The Content Hub profile and the workflows you configure decide what each of these services can do.

Because the Parlam services reach your Content Manager over the network, your Content Manager API and Access Management must be reachable from the Parlam cloud.



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2 Installation guide

2.1 Prerequisites

Before you start the installation, it is a good idea to check that you have everything you need at hand, both in Parlam and in Tridion. That way you will avoid getting stuck halfway through a step for lack of a permission or a piece of information.

In Parlam, you need to sign in with a user that has the **Administrator** role. It is the only role that can create workflows and Content Hub profiles, which is what you will do while activating the connector. If you don't have it, ask a Parlam administrator in your company to assign it to you or to go through these steps with you.

You also need the languages you are going to work with, both the source language and the target languages, to be added to the **Working languages** of the Parlam account. They are the languages you will be able to work with from Tridion, so it is worth reviewing that list before you start. You will find it in **Administration** › **Settings** › **Working languages**, and only administrators can change it.

Along with the languages, have the language mapping ready, if you need one: it relates the Tridion language codes to the Parlam ones, for when they don't match, and you will specify it in the Content Hub profile. You create it in **Administration** › **Content Hub** › **Language mappings**.

In addition, each editor who is going to send content needs a Parlam user that belongs to a **department**. Each project that arrives from Tridion will have that user as its owner in Parlam, and that owner must belong to the workflow's department. To create the users in Parlam and add them to a department, talk to an administrator of the Parlam account in your organization.

In Tridion you need **Tridion Sites 10** with **Experience Space** and the **Add-ons** service available. The **Content Manager API** (Core Service REST API, version 2.0) and **Tridion Access Management** must be reachable over HTTPS from the Parlam cloud. If you want to learn more about Tridion Sites, you will find all the information at docs.rws.com.

Your BluePrint must have a **source publication** with the original content and a **child publication** for each language you want to translate into.

You also need a Tridion administrator who can create a service account in Access Management, create groups and manage who belongs to them, and install add-ons.

User mapping

This connector uses **user mapping**, and it is mandatory: Parlam will not let you start the Content Hub profile without it. Each project created from Tridion belongs in Parlam to a Parlam user, and the user

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mapping is what relates each Tridion editor to their Parlam user. Have one ready with all the editors who are going to send content; you create it in **Administration** › **Content Hub** › **User mappings**, and you will specify it in the Content Hub profile. Remember that those Parlam users must belong to the workflow's department.

2.2 Preparing Tridion

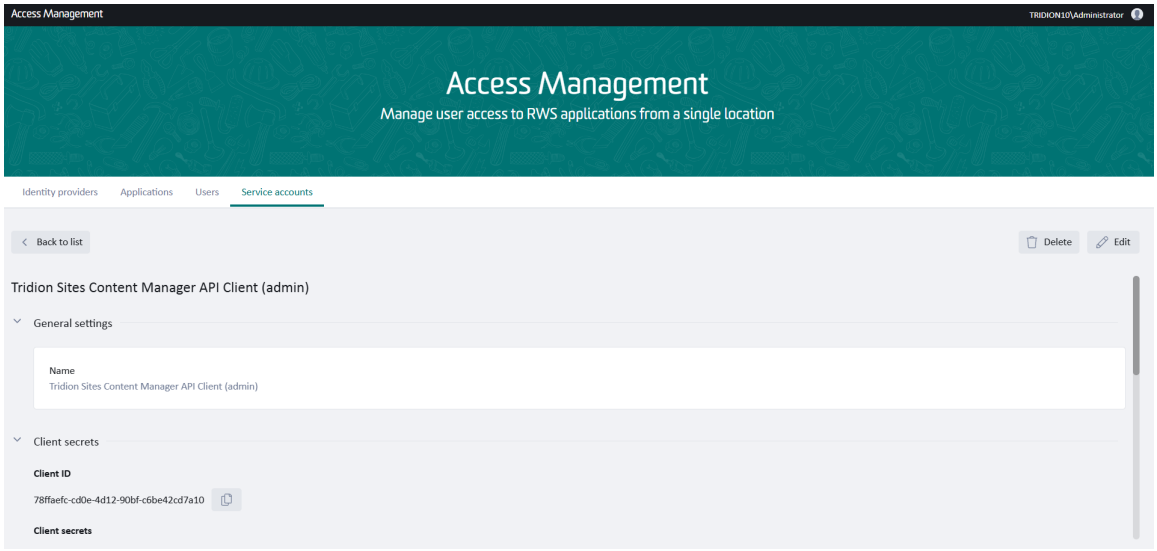
Before you go to Parlam, prepare Tridion so the connector can work with it: create the service account it will connect with, create the two Parlam groups and review your BluePrint. All of this is done by a Tridion administrator.

2.2.1 Create a service account for Parlam

The Parlam services connect to your Content Manager with a Tridion Access Management **service account**, using the OAuth *client credentials* flow. It is not an application or a person's user: it is an account of the connector's own, with its **Client ID** and its **Client secret**, and with administrator access to the Content Manager API.

1. Sign in to Tridion Access Management as an administrator.
2. Open the **Service accounts** tab and create a new service account.
3. In **General settings**, enter a **Name** that identifies it, for example *Parlam Content Hub*.
4. In **Client secrets**, create a client secret and choose its expiration date. Copy its value at that moment and store it in a safe place: afterwards only its first characters are shown.
5. Also copy the **Client ID** shown above it, with the copy button next to it.
6. In **Access settings** › **Services and roles**, select **Administrator** in **Tridion Sites Content Manager API**. You don't need to select anything in **Access Management API** or **Add-ons API**.
7. Save.

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The connector needs that administrator role because it reads publications, schemas, templates, items, users and groups; checks out, updates and checks in the translated items in the target publications, and publishes to the targets you choose.

Each service account supports up to two client secrets. Use this to change the secret without interrupting the service: create the second one before the first one expires, change it in the Content Hub profile and, once you have checked that it works, delete the old one. Note down the expiration date, because when the secret expires the connector can no longer connect to Tridion.

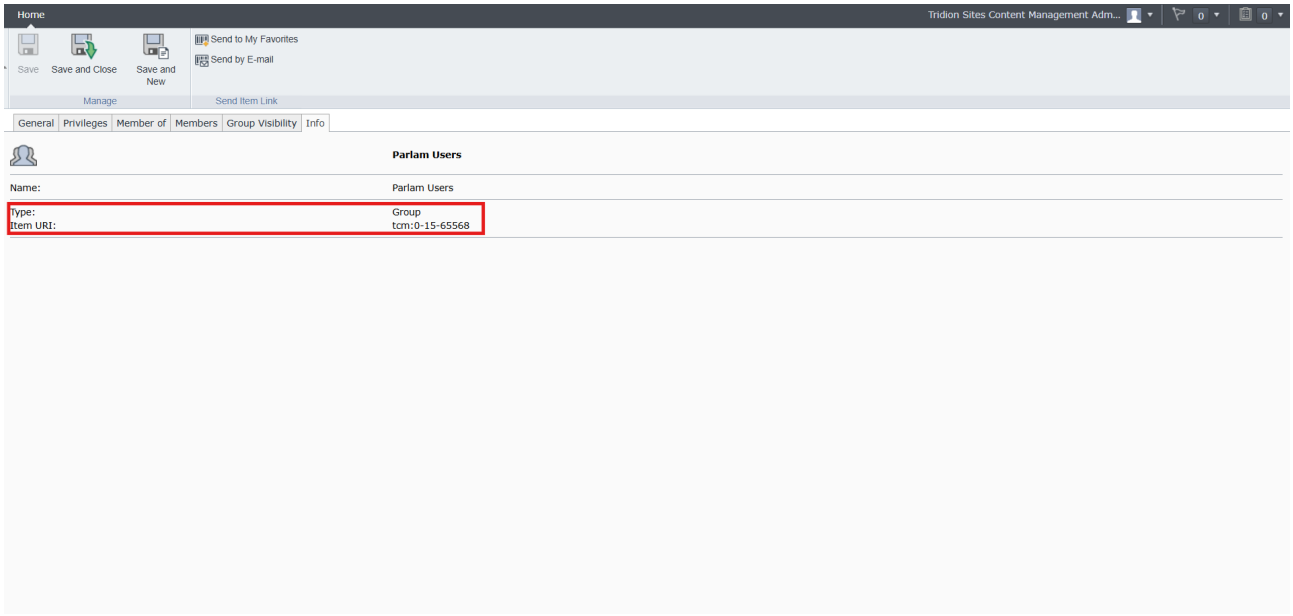
2.2.2 Create the Parlam groups

The connector uses two Tridion groups to decide who can use it:

Group	Its members can
Parlam Users	See **Translate** and **Parlam Queue**, create translation projects and track their own.
Parlam Admins	See **Parlam Setup**, configure the setups and publishing, and see and manage everyone's projects.

1. In Tridion, create a group for each one, for example *Parlam Users* and *Parlam Admins*.
2. Add the users directly to the groups: if someone is only in a group through a nested group, it doesn't count.
3. Add your Parlam administrators to **both** groups, because **Translate** and **Parlam Queue** only appear to members of **Parlam Users**.
4. Note down the **TCM URI** of each group, for example `tcm:0-15-65568`. You will need them twice: in the Content Hub profile and in the add-on's configuration file.

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Anyone who is in neither of the two groups will not be able to open any Parlam window. Changes to the groups can take up to 5 minutes to take effect in Parlam.

2.2.3 Locate the publishing Business Process Type

This step is only needed if you want Parlam to publish the translated content. Note down the TCM URI of the **Business Process Type** whose publishing targets you want to use: Parlam uses it to offer you those targets when you create publishing profiles.

2.2.4 Review the BluePrint

- Check that each target language has its own publication, a child of the source publication.
- Check that the original content is in the source publication. Editors must always select the items in the source publication: if they choose them in a target publication, the connector rejects them.

What you should have now

Item	Where it comes from
Client ID and **Client secret**	The service account you created in Access Management.
TCM URI of the **Parlam Users** group	The group you just created.
TCM URI of the **Parlam Admins** group	The group you just created.
TCM URI of the **Business Process Type**	Only if you are going to publish from Parlam.

2.3 Activating the connector in Parlam

With Tridion prepared, it's time to register the connector in Parlam. You will do this in the **Administration** section of the side menu, with your **Administrator** user, and in this order: first you will create the workflow the projects will follow, then the Content Hub profile that links that workflow to

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Tridion, then you will test the connection and start the profile and, finally, you will install the add-on in Tridion. The order matters, because each step needs what you created in the previous one.

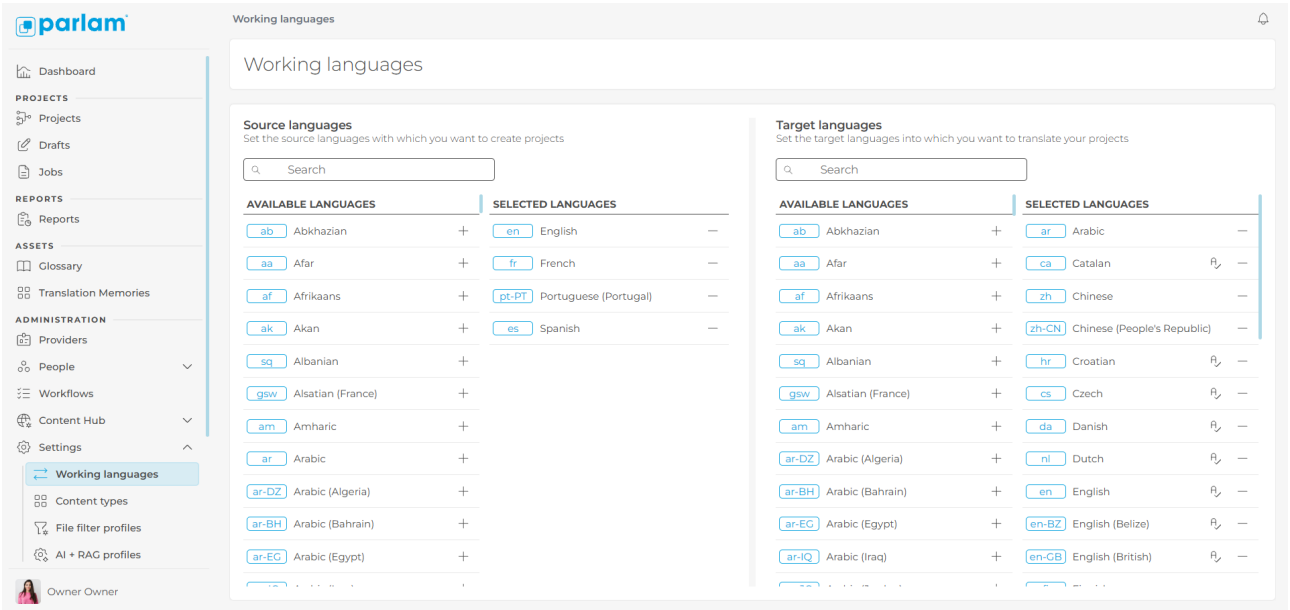
2.3.1 Create the workflow

The workflow is the set of rules that each project arriving from Tridion will follow: who translates and who reviews, which translation memory and which glossary are applied, and by when it must be ready. Take a moment to think it through, because how your content is handled from now on depends on it.

First check the working languages

The languages you will be able to work with from Tridion are those registered in the **Working languages** of your Parlam account, so start by reviewing them.

1. Go to **Administration** › **Settings** › **Working languages**.
2. Check that the source language of your content appears among the source languages, and that each language you want to translate into appears among the target languages. If any is missing, add it.

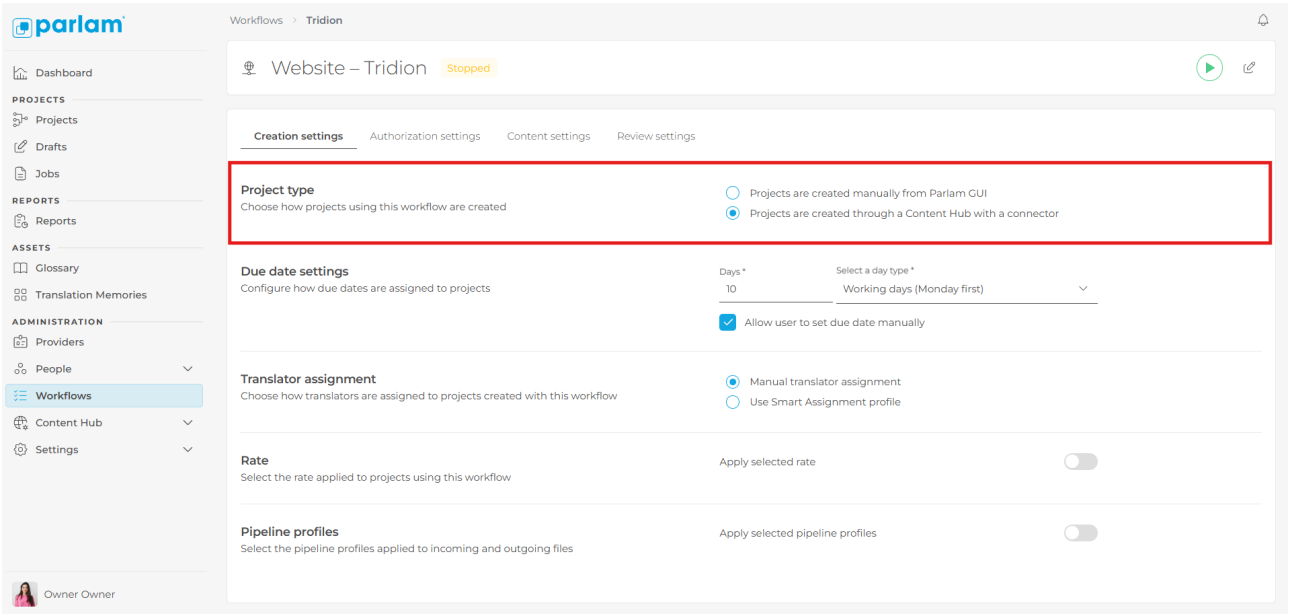


Create the workflow

1. Go to **Administration** › **Workflows**.
2. Click **+ New workflow**.
3. Enter a **Name** that will help you recognize it later, for example *Website – Tridion*.

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4. In the project type, select **Projects created through Content Hub**. This is the type the connectors use: projects are not created by hand in Parlam, but arrive automatically from Tridion. Only workflows of this type can be linked to a Content Hub profile.
5. Save.



Before continuing, review all the workflow parameters and adjust them to your company's needs: the workflow defines how each project arriving from Tridion will be handled.

Start the workflow

1. Click the **play** button at the top of the workflow page.
2. Check that the status changes to **Started**.



While the workflow is stopped, projects cannot be created from Tridion.

2.3.2 Create the Content Hub profile

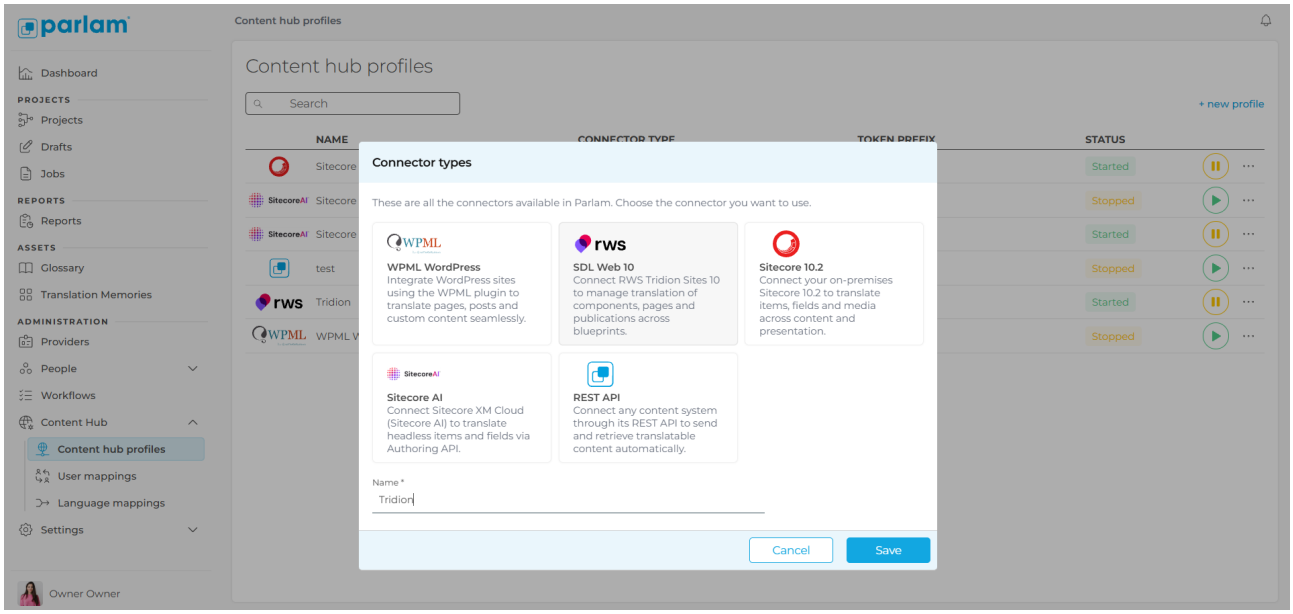
The Content Hub profile is what links Tridion to Parlam: it specifies which workflow the projects follow and how to reach Tridion.

Create the profile

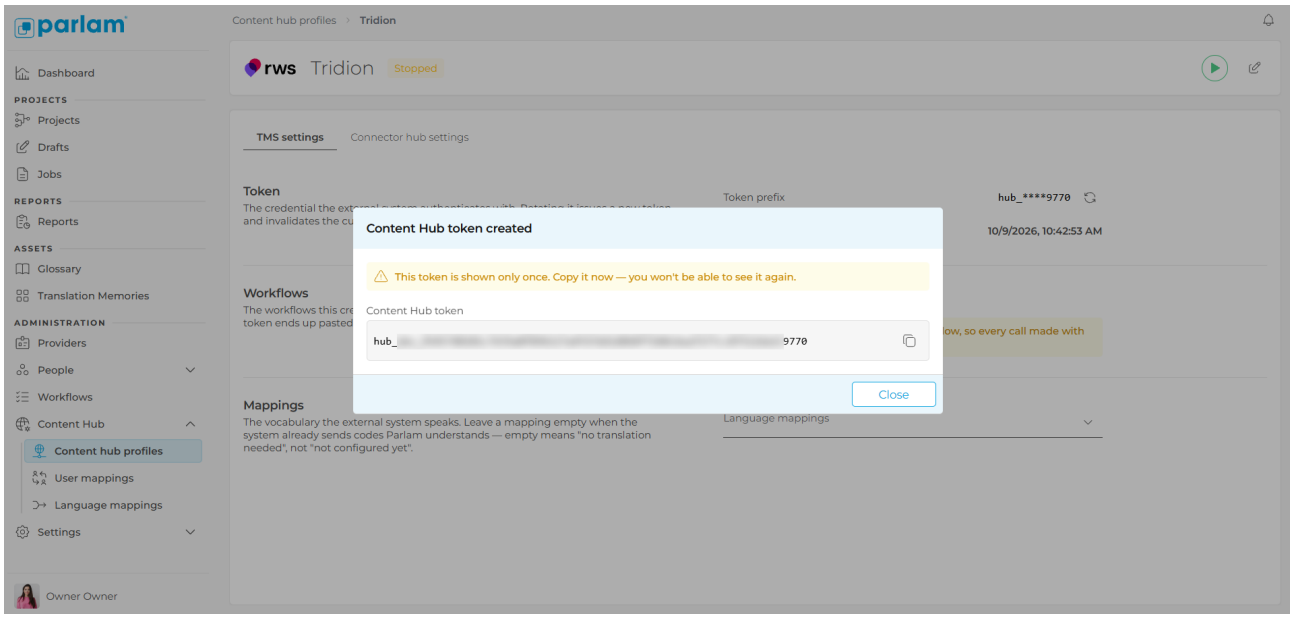
1. Go to **Administration › Content Hub › Content hub profiles**.
2. Click **+ New profile**.
3. In the **Connector types** dialog box, select **SDL Web 10**.

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4. Enter a **Name** that will help you recognize the profile, for example the name of your Tridion installation.
5. Save. Keep in mind that the connector type cannot be changed later.



When you save, Parlam shows you the Content Hub token. **Copy it at that moment and store it in a safe place**, because it is not shown again. You will need it later to connect Tridion to Parlam, and you must treat it like a password.

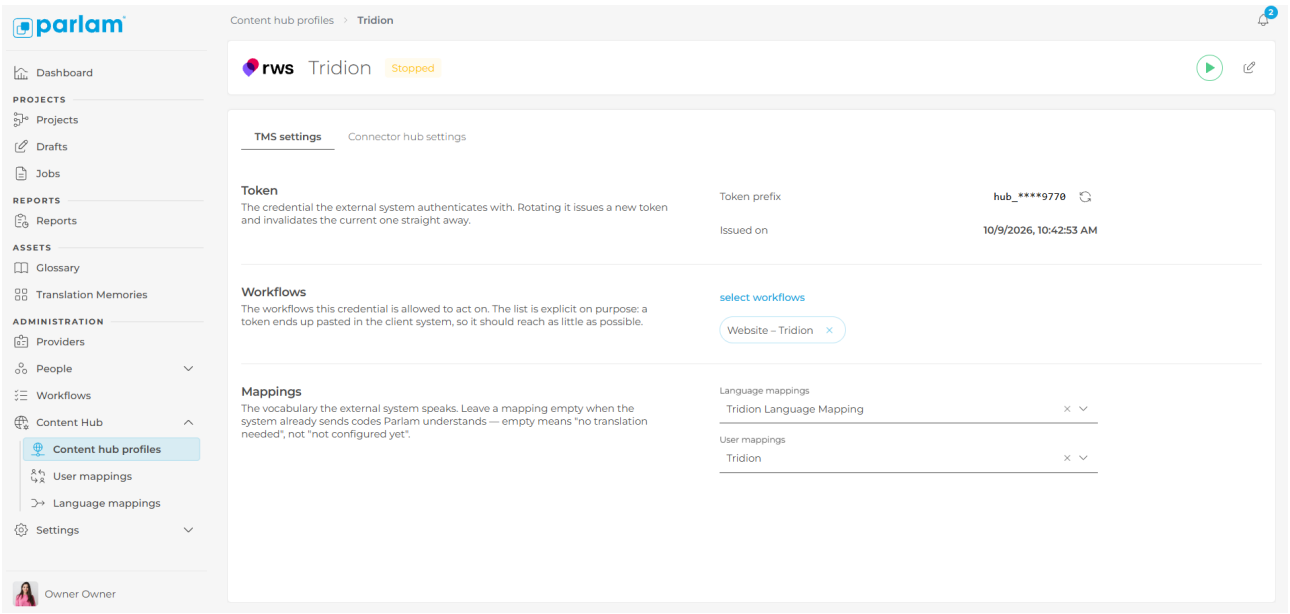


TMS settings tab

In this tab you specify which workflows the projects can follow and how the Tridion languages and users relate to the Parlam ones.

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1. In **Workflows**, click **Select workflows** and select the workflow you created in the previous section.
2. In **Language mappings**, select the language mapping you prepared in the prerequisites, if you need it.
3. Save.



In the case of Tridion, keep the following in mind when filling in this tab.

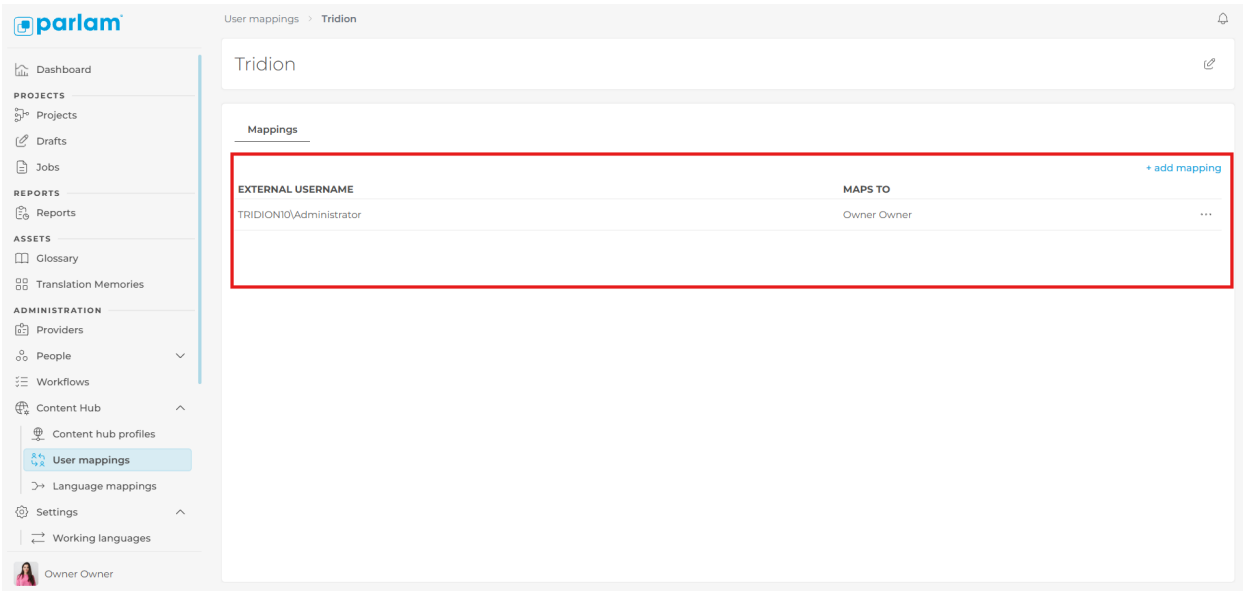
You can select **several workflows**. Each setup in **Parlam Setup** uses one of them, so select here all the ones your setups are going to use.

In addition, you must specify the **user mapping**, which is mandatory in this connector:

1. In **User mappings**, select the user mapping you prepared in the prerequisites.
2. Save.

In that mapping, each editor must appear with their Tridion username in **External username** and their Parlam user in **Maps to**. If an editor is not in the mapping, they will not be able to create projects.

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Normally you will not need a language mapping: the languages of your target publications are chosen in each setup from the list of Parlam languages.

Connector hub settings tab

For Tridion, in this tab you specify how the connector reaches your Content Manager and which groups are the Parlam groups.

1. In **Connection Settings**, fill in these details:

Setting	What to enter	Required
Content Manager API URL	The address of the Content Manager web service, which the connector uses for all its calls.	Yes
Access Management base URL	The base address of Tridion Access Management, where the connector requests its access.	Yes
OAuth client id	The **Client ID** of the service account you created for Parlam.	Yes
OAuth client secret	The **Client secret** of that service account. It is stored hidden and is not shown again.	Yes
Parlam Admins group (TCM URI)	The TCM URI of your **Parlam Admins** group.	It appears as optional on screen, but it is needed
Parlam Users group (TCM URI)	The TCM URI of your **Parlam Users** group.	It appears as optional on screen, but it is needed
Publishing Business Process Type (TCM URI)	The TCM URI of the Business Process Type whose targets you want to use.	Only if you are going to publish from Parlam

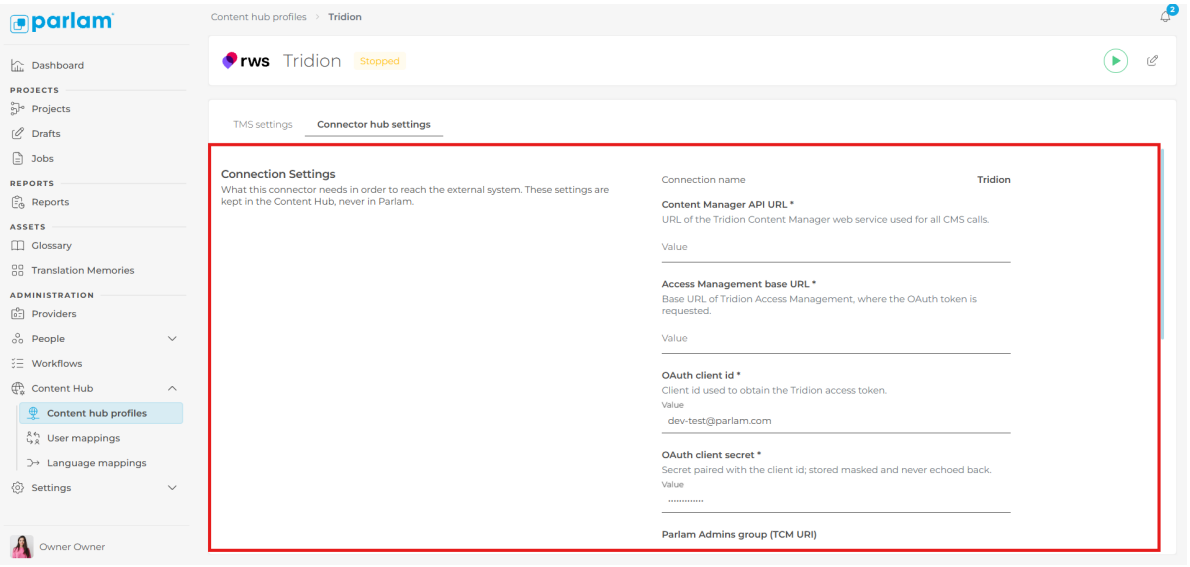
The addresses must be complete, starting with `https://`. When you fill in a group or the Business Process Type, Parlam checks it against Tridion at that moment and tells you, for example, whether it exists; for that, the two addresses, the client id and the client secret must already be filled in.

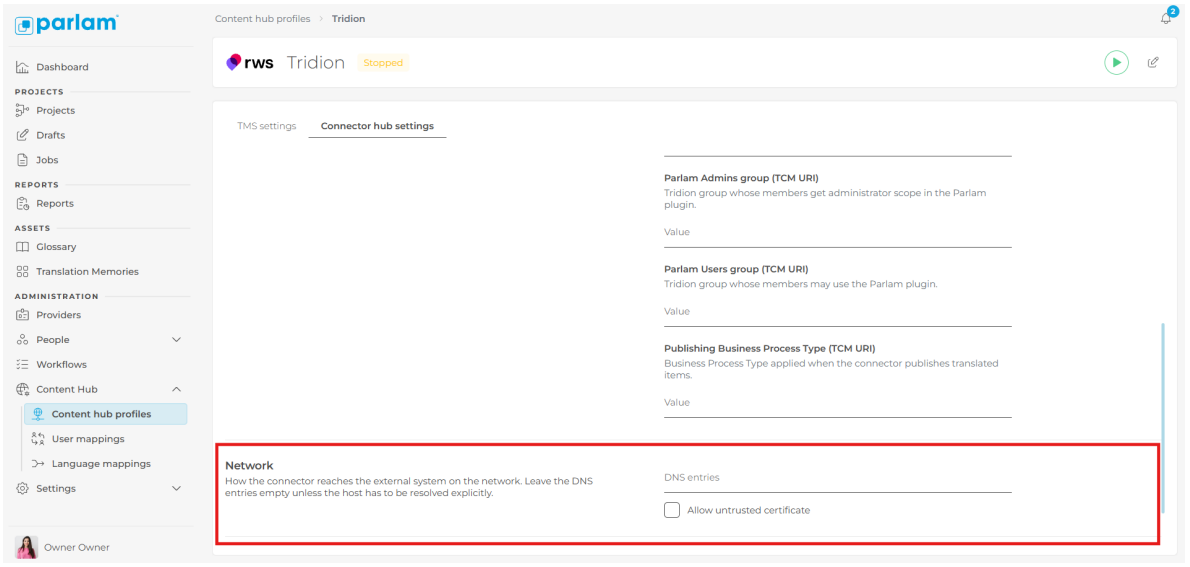
2. In the **Network** section, fill in only what your installation needs:

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- **DNS entries**: only if the name of your Tridion server does not resolve from the Parlam cloud. Enter `hostname:ip` pairs, separated by `;` or one per line, for example `cms.example.com:10.100.100.100`.
- **Allow untrusted certificate**: only if your Tridion servers use a self-signed certificate or one from an internal authority.

3. Save.





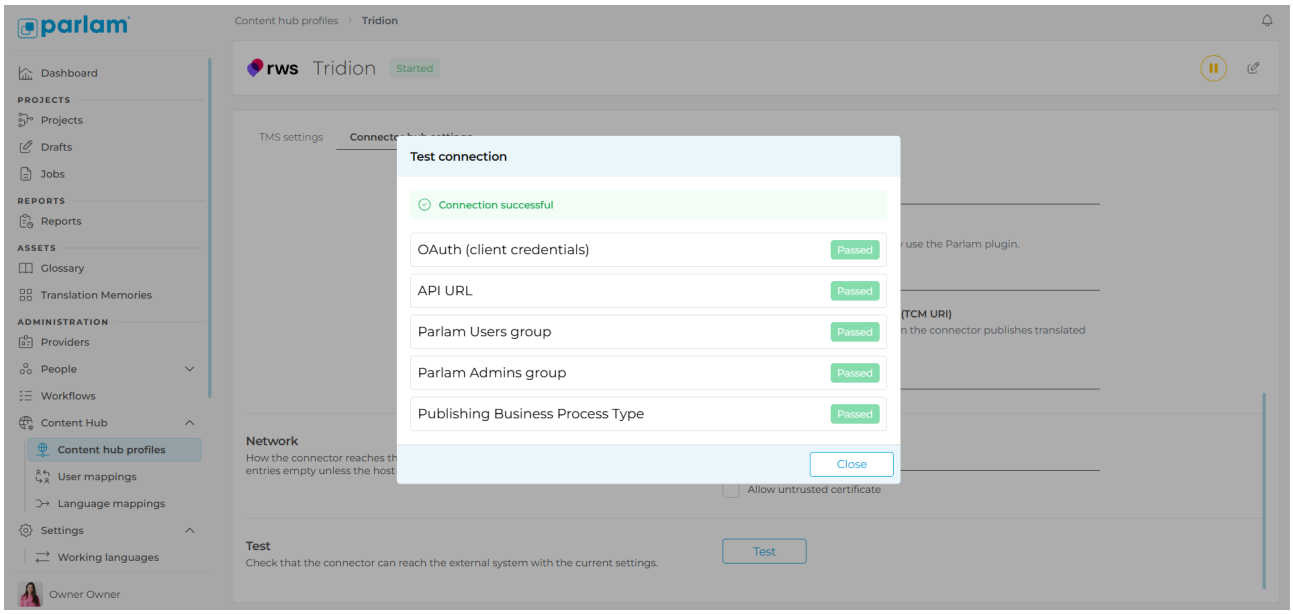
Always fill in both groups: if either is missing, Parlam cannot recognize the Tridion users and nobody will be able to use the connector.

2.3.3 Test the connection

Before you start the profile, check that Parlam can reach Tridion. The test only reads: it does not write anything to your system, so you can repeat it as many times as you need.

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1. On the profile page, click **Test**.
2. The **Test connection** dialog box opens and runs a series of checks. Each one ends as **Passed**, **Failed** or **Skipped**.
3. If none fails, you will see **Connection successful**. If any fails, you will see **Connection failed**; review the check that failed, fix the configuration and test again.



In Tridion, the test runs these checks against your Content Manager:

Check	What it looks at	If it fails
OAuth (client credentials)	That Access Management gives you access with the **OAuth client id** and the **OAuth client secret**.	Review the **Access Management base URL**, the client id and the client secret.
API URL	That the **Content Manager API URL** responds. It tells you how many publications it found.	Review the address and that the API is reachable from the Parlam cloud.
Parlam Users group	That the TCM URI of the **Parlam Users** group exists in Tridion.	Review the group's TCM URI.
Parlam Admins group	That the TCM URI of the **Parlam Admins** group exists in Tridion.	Review the group's TCM URI.
Publishing Business Process Type	If you filled it in, that it exists and how many publishing target types it has.	Review the TCM URI. If you did not fill it in, it appears as **Skipped**.

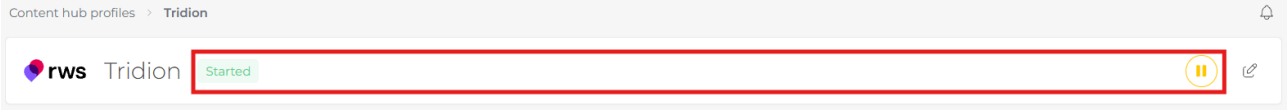
If **OAuth (client credentials)** fails, the other checks appear as **Skipped**, because they cannot be run without access.

This test checks the path from Parlam to your Tridion. It does not check the add-on: you will see that when you install it and open the Parlam windows.

Start the profile

1. Click the **play** button at the top of the profile page.
2. Check that the status changes to **Started**.

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While the profile is running, its configuration is locked; if you need to change something, stop it first. Parlam will not let you start it if it has no workflow, if it has no user mapping or if a required setting is missing.

2.3.4 Install the Parlam add-on in Tridion

With the profile running, all that is left is to install in Tridion the add-on that adds the Parlam buttons. The add-on needs a configuration file with your Content Hub token, so this is the time to use the token you stored when you created the profile.

Prepare the configuration file

Parlam gives you the add-on package as a `.zip` file, for example `parlamtms-connector-10.3.3.zip`, together with its configuration file, `parlamtms-connector.json`. Before installing the add-on, you must fill in that file with the details of your installation.

The file has a section for each of the three parts of the add-on: `parlamtms-project-context-menu`, which adds **Translate**; `parlamtms-queue-main-navigation`, which adds **Parlam Queue**, and `parlamtms-setup-button`, which adds **Parlam Setup**. All three contain the same five values, and they must be identical in all three:

Key	What to enter
`ParlamConnectorUrl`	The address of the Parlam connector application in your zone: `https://tridion10-contenthub.<zone>.parlam.com`.
`ParlamConnectorApiUrl`	The address of the Parlam connector service in your zone: `https://api-tridion10-contenthub.<zone>.parlam.com`.
`ParlamUsersGroupTcm`	The TCM URI of your **Parlam Users** group, for example `tcm:0-15-65568`.
`ParlamAdminsGroupTcm`	The TCM URI of your **Parlam Admins** group, for example `tcm:0-16-65568`.
`ParlamHubToken`	The Content Hub token you stored when you created the profile. It starts with `hub_`.

The addresses depend on your zone. Parlam runs in several zones, and each Parlam account is in one of them. The zone is part of both addresses, for example `eu` in `https://tridion10-contenthub.eu.parlam.com`. If you don't know which zone your service is in, ask Parlam before filling in the file: with the wrong zone, the Parlam buttons will appear in Tridion, but they will not be able to open any window.

This is what the complete file looks like for an account in the `eu` zone:

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When editing it, keep in mind:

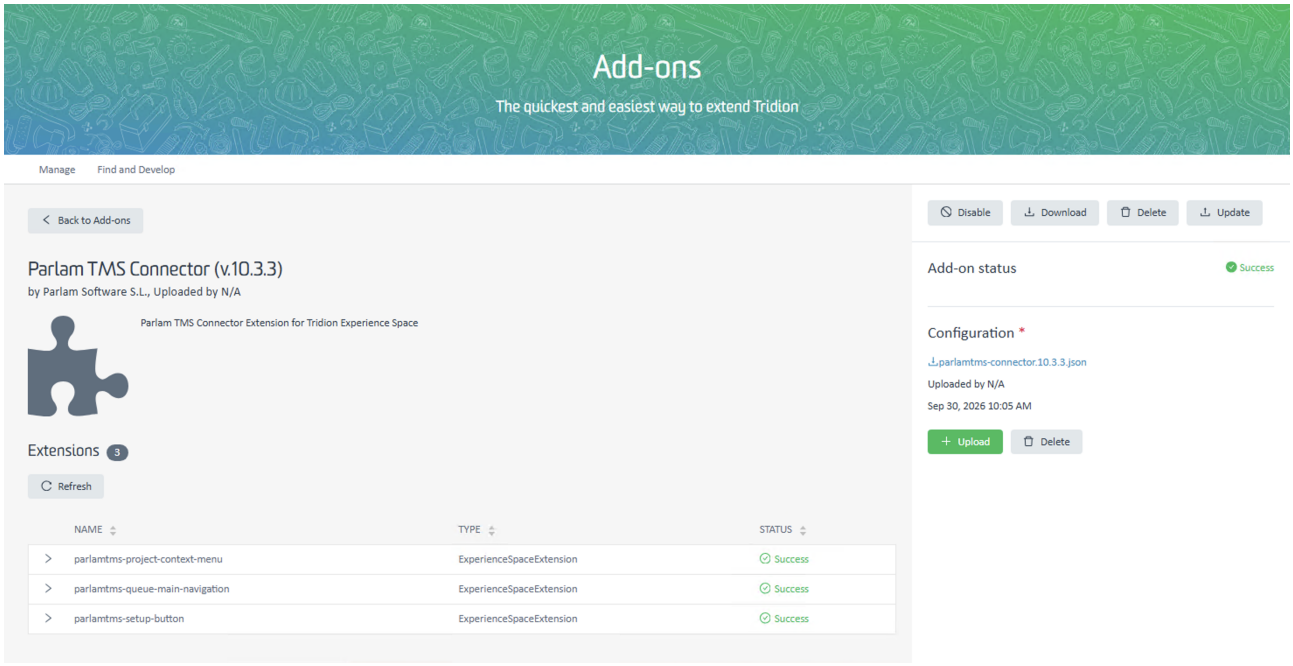
- Enter the complete addresses, with `https://` and without a trailing slash.
- There is no comma after the last value of each section. If there is an extra or missing comma, the file is not valid JSON and Tridion will not be able to read it.
- The TCM URIs of the groups must be the same ones you entered in the Content Hub profile: the file decides which buttons each person sees, and the profile decides what Parlam lets them do.

Store this file in a safe place: it contains your token, so treat it like a password.

Install the add-on

1. Sign in to Tridion as an administrator and open the **Add-ons** management.
2. Upload the add-on package (`parlamtms-connector-<version>.zip`).
3. Open **Parlam TMS Connector** and upload the `parlamtms-connector.json` configuration file you just prepared. Do this right after uploading the package: without the configuration file, the add-on waits for you to upload it and is not activated.
4. Check that the add-on and its three extensions appear as successfully deployed.

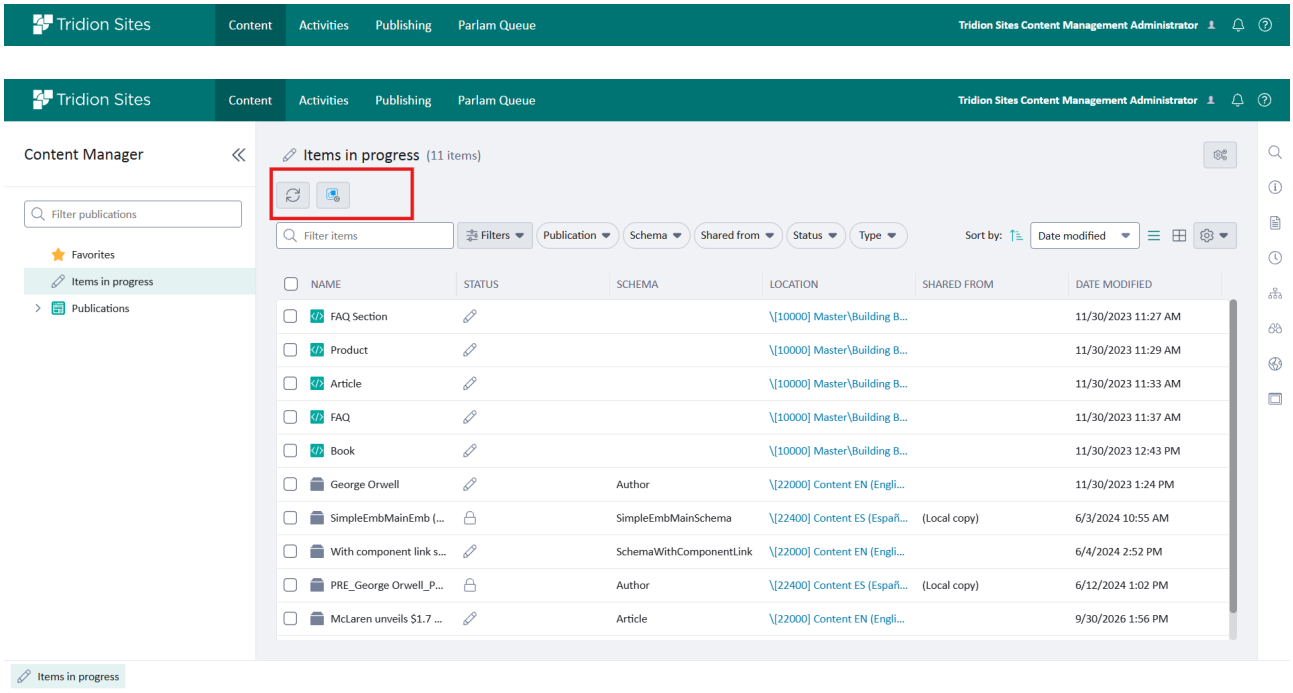
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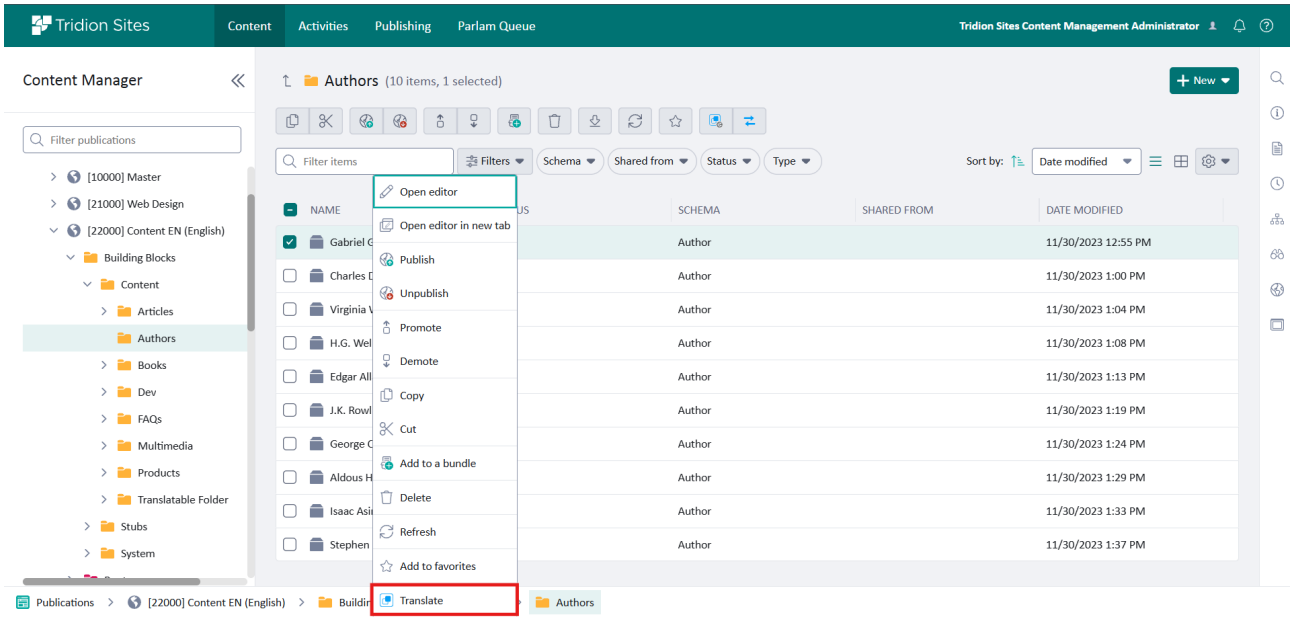
5. Allow pop-up windows from your Tridion address in your browser: **Translate** and **Parlam Setup** open in a separate window.

Check the installation

Sign in to Experience Space with a user who is in both Parlam groups and reload the page. You should see **Parlam Queue** in the main navigation of the header, **Parlam Setup** in the content explorer's toolbar and **Translate** when you right-click a component or a page.



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To install a new version of the add-on, upload the new package in the **Add-ons** management. To change a configuration value, upload the file again.

If you change the token

If you lose the token or think someone else has seen it, generate a new one in the Content Hub profile with **Rotate token**. The previous token stops working at that very moment, so put the new one in the configuration file and upload it again right away: until you do, the Parlam buttons will not be able to open their windows.

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3 User guide

3.1 Roles and users

In the day-to-day use of the connector, people from two worlds are involved: those who work in Tridion and those who work in Parlam. It helps to be clear about what each one does, so you know whom to turn to in each case.

In Parlam

The user with the **Administrator** role is the one who configures the connector: they create and modify the workflow and the Content Hub profile, manage the working languages and the mappings, test the connection, start or stop the profile and, if needed, generate a new token. They are also the person to turn to if something stops working on the Parlam side.

The rest of the Parlam users don't need to touch any of this configuration. The project owners, who must belong to the workflow's department, can track them in Parlam from **Projects** and **Jobs** and receive email notifications. Translators and reviewers, whether from your company or external, work on the projects like any other Parlam job, without needing to know that the content comes from Tridion.

In this connector, each project belongs in Parlam to the Parlam user that corresponds, according to the user mapping, to the editor who created it in Tridion. That Parlam user must belong to the department of the setup's workflow, and is the one who receives the notifications for their projects. Editors don't need to sign in to Parlam to use the connector.

In Tridion

What each person sees in Tridion depends on the two Parlam groups you created when you prepared Tridion:

Group	Translate	Parlam Queue	Parlam Setup	Projects they see in the queue
Parlam Users	Yes	Yes	No	Their own and, if they are a PM in Parlam, those of their department
Parlam Admins	No	No	Yes	–
Both groups	Yes	Yes	Yes	All those of the connection
Neither	No	No	No	–

That is why your administrators must be in both groups. Administrators can see, change, send and delete any project in the queue; everyone else, the ones they created. Everyone can create and send projects, as long as they are in the user mapping and their Parlam user belongs to the workflow's department.

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The queue also follows the same rule as Parlam. If an editor's Parlam user is an **Owner** or **Administrator** of the account, they see the whole queue. If they are the PM of a department, they also see all the projects of that department's workflows, even if others created them, and can do the same with them as with their own. Since each setup can use a different workflow, a PM can see the projects of some setups and not those of others. If you change someone's role or departments in Parlam, the queue reflects it within a few minutes.

Only those who are directly in the group count: if someone is in it through a nested group, they are not recognized. Changes to the Tridion groups can take up to 5 minutes to take effect in Parlam.

These groups do not grant any permission over the content: each person can still read and edit only what their other Tridion permissions allow.

The connector account

Everything the connector reads, writes and publishes in Tridion, it does with the service account you created in Access Management, not with the editor's user. That is why the permissions of that account are what set how far the connector can go.

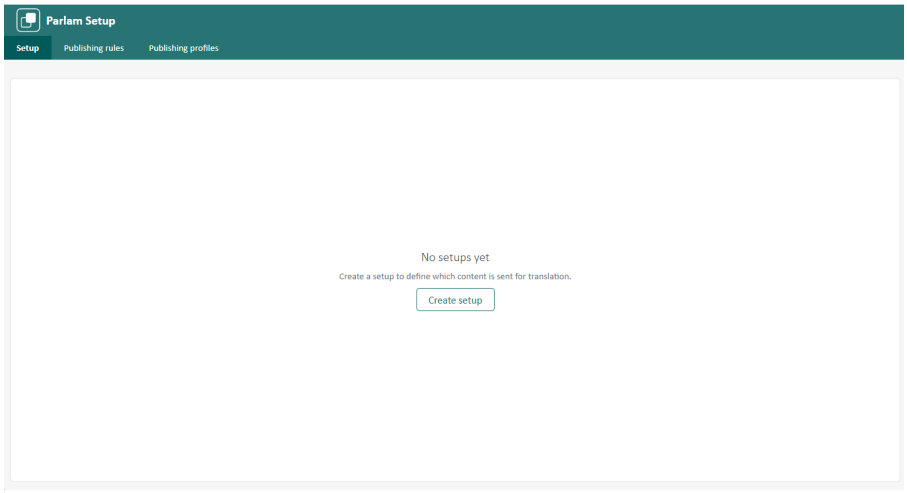
3.2 Configuration

In Tridion, what gets translated is configured in **setups**. A setup tells the connector what can be translated from a source publication, into which languages and with which workflow. You can create several, for example one per website, but each source publication can only be in one. Setups are managed in the **Parlam Setup** window, which only members of **Parlam Admins** see.

Open Parlam Setup

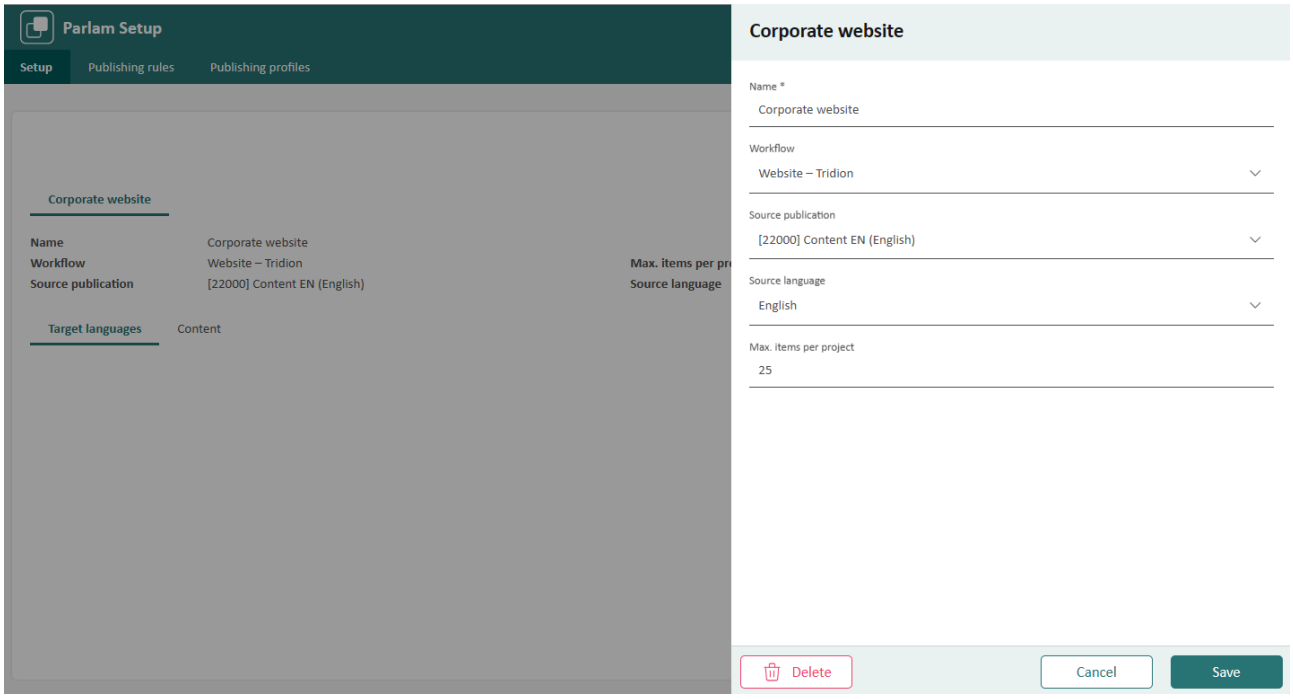
1. In Tridion Experience Space, open the content explorer.
2. Click **Parlam Setup**, in the toolbar. The **Parlam Setup** window opens, with three tabs: **Setup**, **Publishing rules** and **Publishing profiles**.

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Create a setup

1. In the **Setup** tab, click **Create setup**, or **+ New setup** if you already have one, and click the edit icon.
2. Fill in the side panel:
   - **Name**: a name for the setup, for example *Corporate website*.
   - **Workflow**: one of the workflows you selected in the Content Hub profile.
   - **Source publication**: the Tridion publication that has the original content.
   - **Source language**: the language of that publication.
   - **Max. items per project**: the maximum number of items an editor can include in a project, up to 50.
3. Click **Save**.

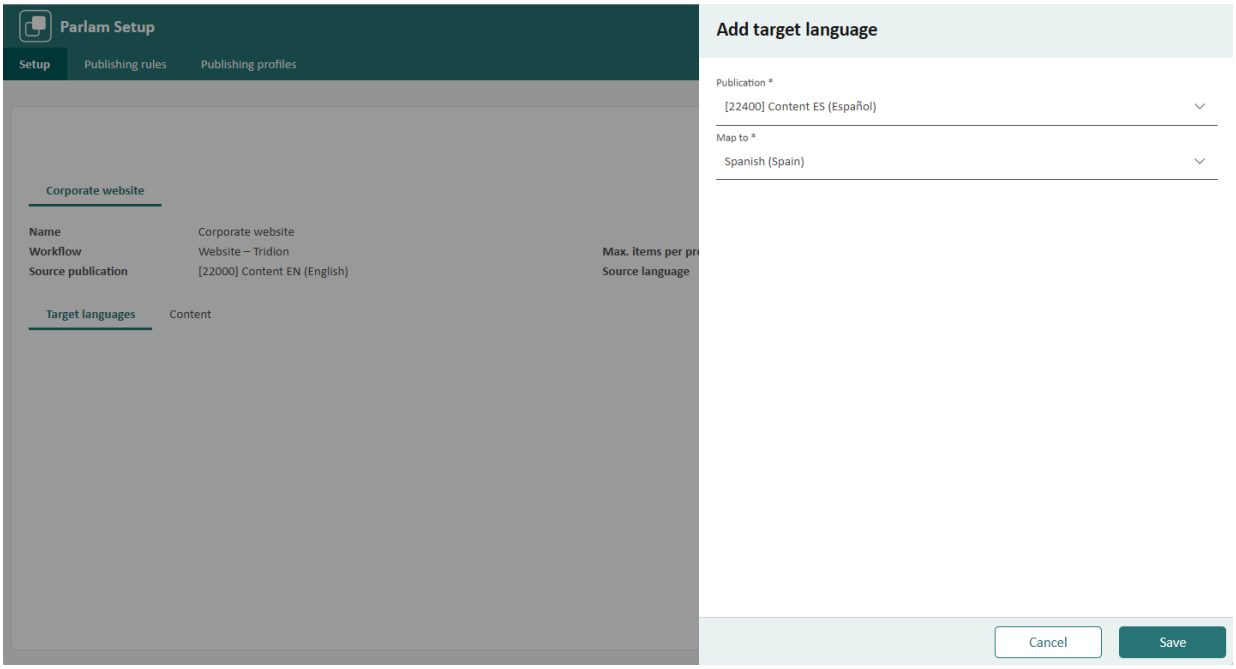


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Each setup appears as a tab with its name, and you see its details in its header; use the edit icon to change them. Keep in mind that, if you change the source publication, all the setup's target languages are deleted; Parlam asks you to confirm first.

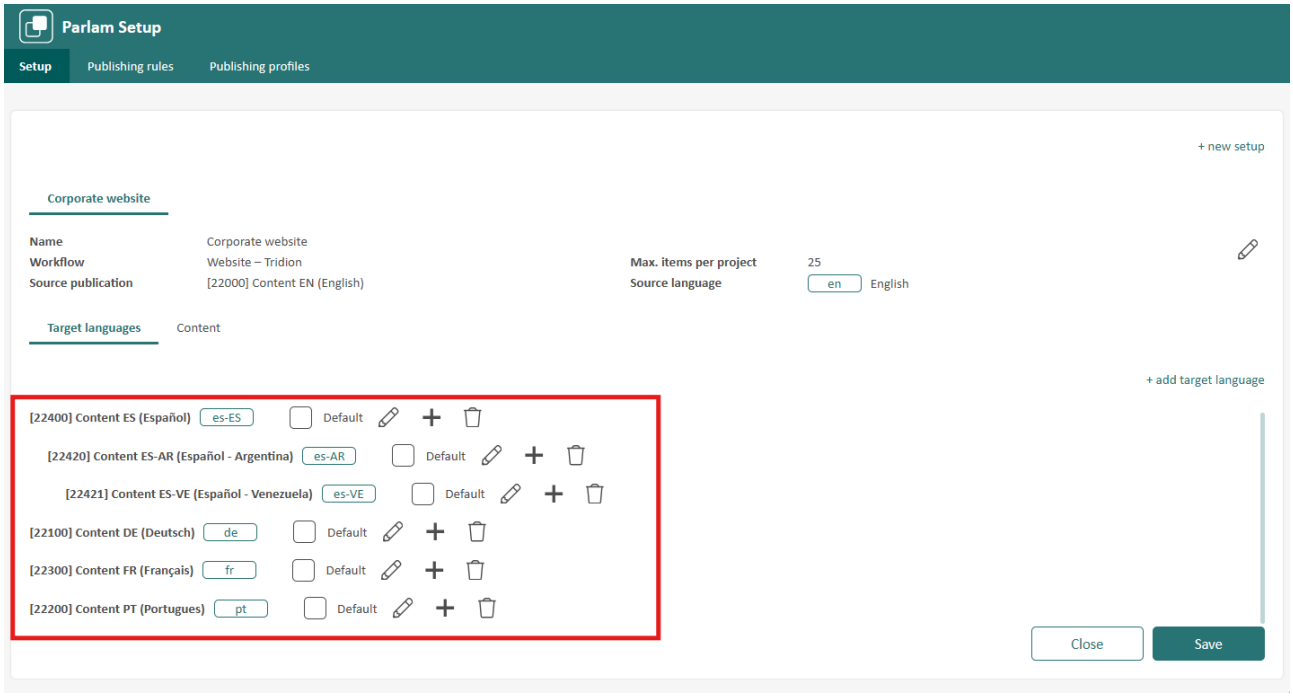
Define the target languages

1. In the setup, open the **Target languages** tab.
2. Click **+ Add target language**.
3. In the side panel, choose the **Publication** that will receive the translation and, in **Map to**, its language.
4. Click **Save** in the side panel. Repeat this for each language.



5. Select **Default** for the languages you want to appear already selected when an editor creates a project. Editors can clear them.
6. If you want to translate in a chain, for example from Spanish to Mexican Spanish, use the add icon of a target language and choose **Add child language**: the child publication will be translated from its parent language, once the parent has been delivered.
7. Click **Save**, at the bottom of the tab.

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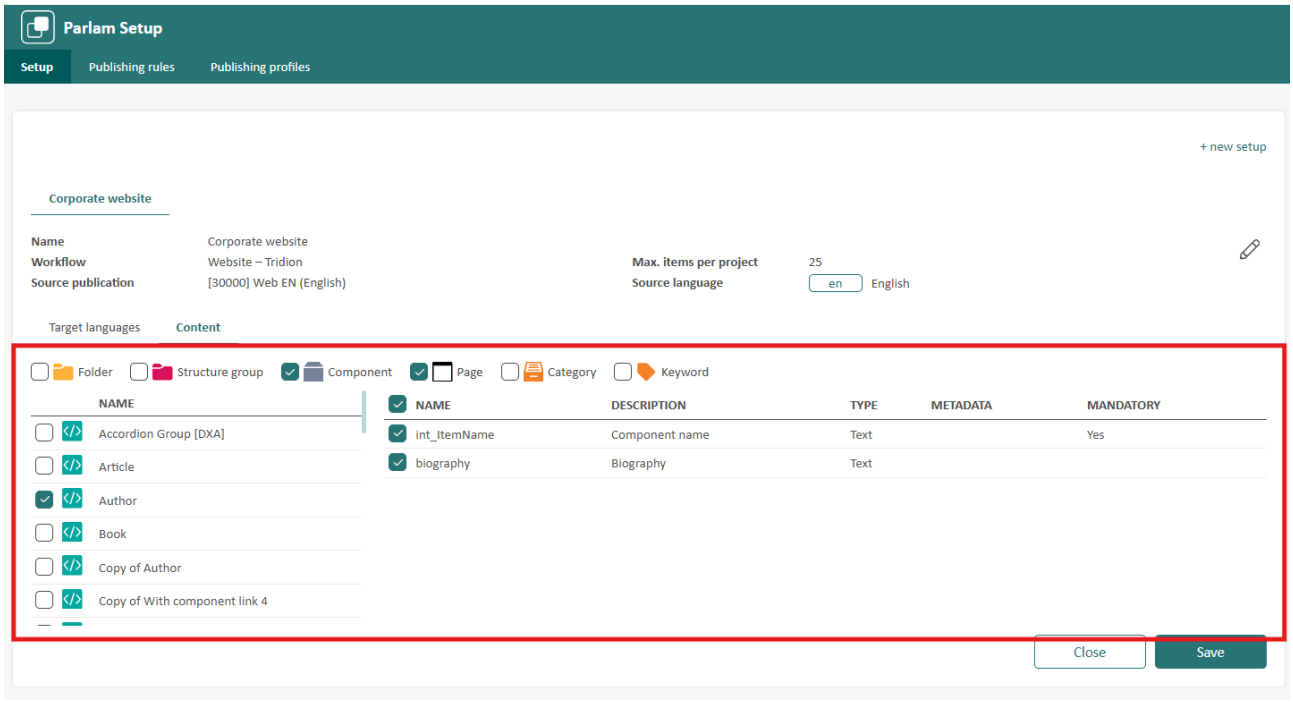


Each publication can only appear once in the setup, and never as source and target at the same time. Each language, including the source language, can only be used once. And all of them must be in the **Working languages** of your Parlam account.

Choose the content that gets translated

1. Open the setup's **Content** tab.
2. At the top, select the item types editors can translate: **Folder**, **Structure group**, **Component**, **Page**, **Category** and **Keyword**.
3. In the list of schemas, which shows those of the source publication, select the schemas whose components you want to translate.
4. Click a schema to see its fields. For each one you will see its **Name**, **Description**, **Type**, whether it is **Metadata** and whether it is **Mandatory**.
5. Select the fields that contain text to translate, both content and metadata. The header checkbox selects or clears all of them.
6. Click **Save**.

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This is what gets sent for translation for each item type:

Item	What gets translated
Component	The fields you selected in its schema, content and metadata.
Page, **Folder**, **Structure group**	Its name and its metadata.
Category, **Keyword**	Its name, its description and its metadata.

And this, by field type:

Field type	Is it translated?
Text (plain text or rich text)	Yes
Embedded	Yes, the selected fields of the embedded schema
External link	Yes
Number, **Date**	No
Multimedia link, **Component link**	No. Links inside rich text are kept and are changed to point to the target publication.

Schemas, templates and publications cannot be translated. In Parlam, translators see a label for each text, such as *Tridion item name*, *Tridion item description* or *Field:* followed by the field's description.

Select only the fields that actually contain text. If a component's schema has no field selected, that component has nothing to translate and the project fails.

Content type

If the workflow assigns a default content type, all projects use it. If the workflow lets you choose, the editor chooses a **Content type** when creating the project.

3.3 Publishing

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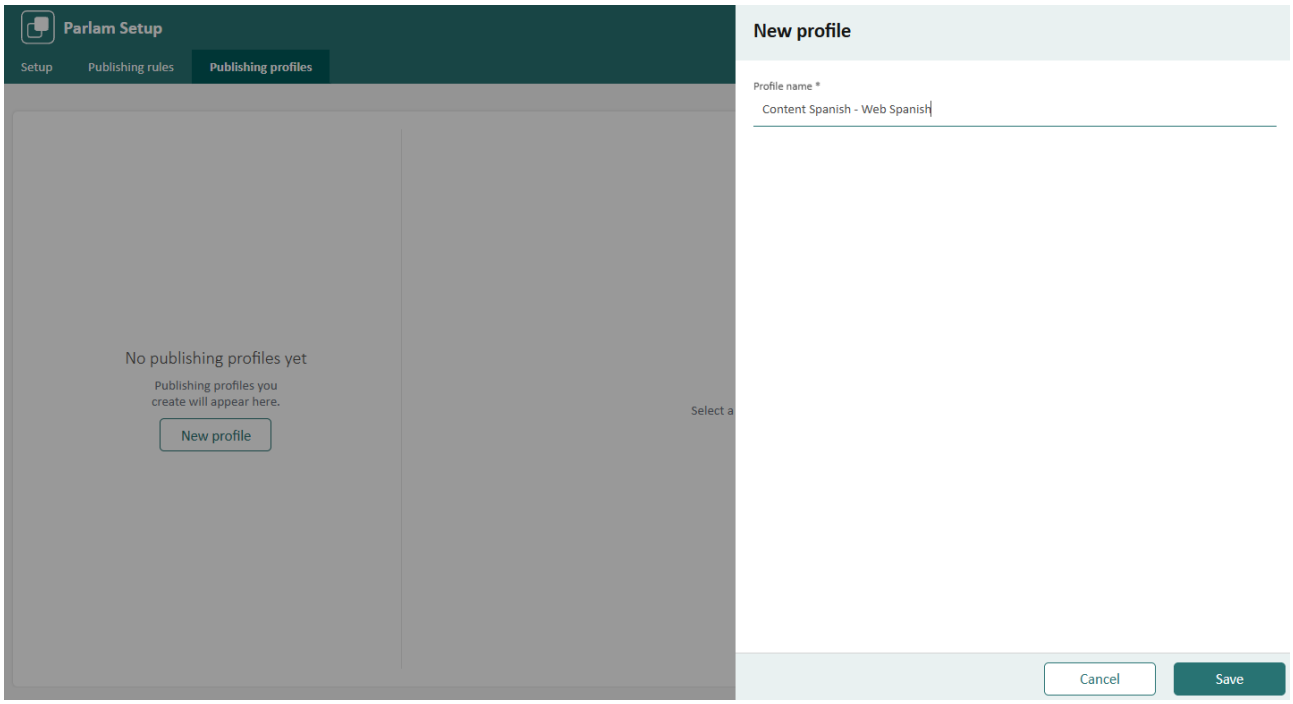
In Tridion, translations are always written to each language's publication. Publishing them as soon as they arrive is optional, and it is configured in two parts, both in the **Parlam Setup** window:

- The **publishing profiles** say **where** to publish: from which translated publication, in which publication, to which target and with which priority.
- The **publishing rules** say **what** to publish when a translated item arrives: for example, the pages that use a translated component.

If no rule covers a translated item, the item is written to Tridion but not published. To use publishing from Parlam, you must have filled in **Publishing Business Process Type (TCM URI)** in the Content Hub profile: Parlam uses it to offer you the publishing targets.

3.3.1 Publishing profiles

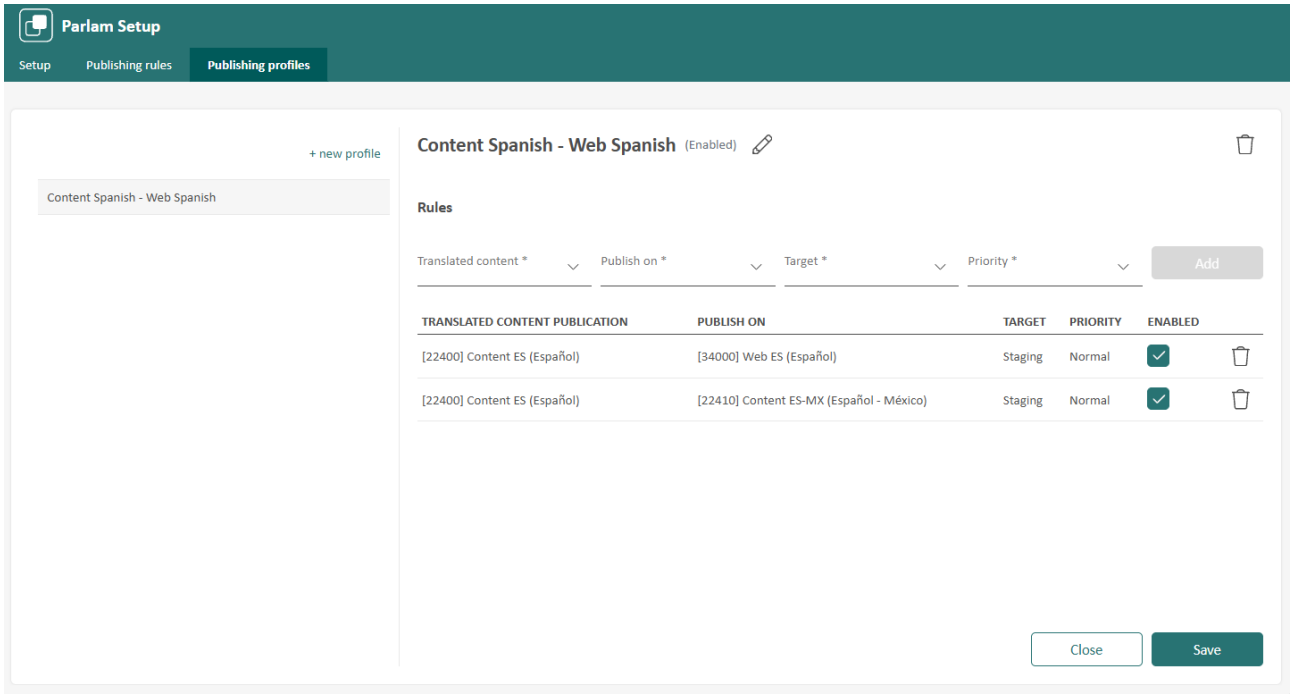
1. In **Parlam Setup**, open the **Publishing profiles** tab.
2. Click **+ New profile**.
3. Enter a **Profile name** and save. The profile is created active (**Enabled**) and without rules.



4. Select the profile in the list and, in **Rules**, fill in:
   - **Translated content**: the publication where the translation is written;
   - **Publish on**: the publication it is published from, which can be the same one or another that inherits from it in the BluePrint;
   - **Target**: the Tridion publishing target;
   - **Priority**: **Low**, **Normal** or **High**.

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5. Click **Add**. The rule appears in the table. Repeat this for each publication and target.
6. Use each rule's **Enabled** checkbox to activate or deactivate it, and its delete button to remove it.
7. Click **Save**.



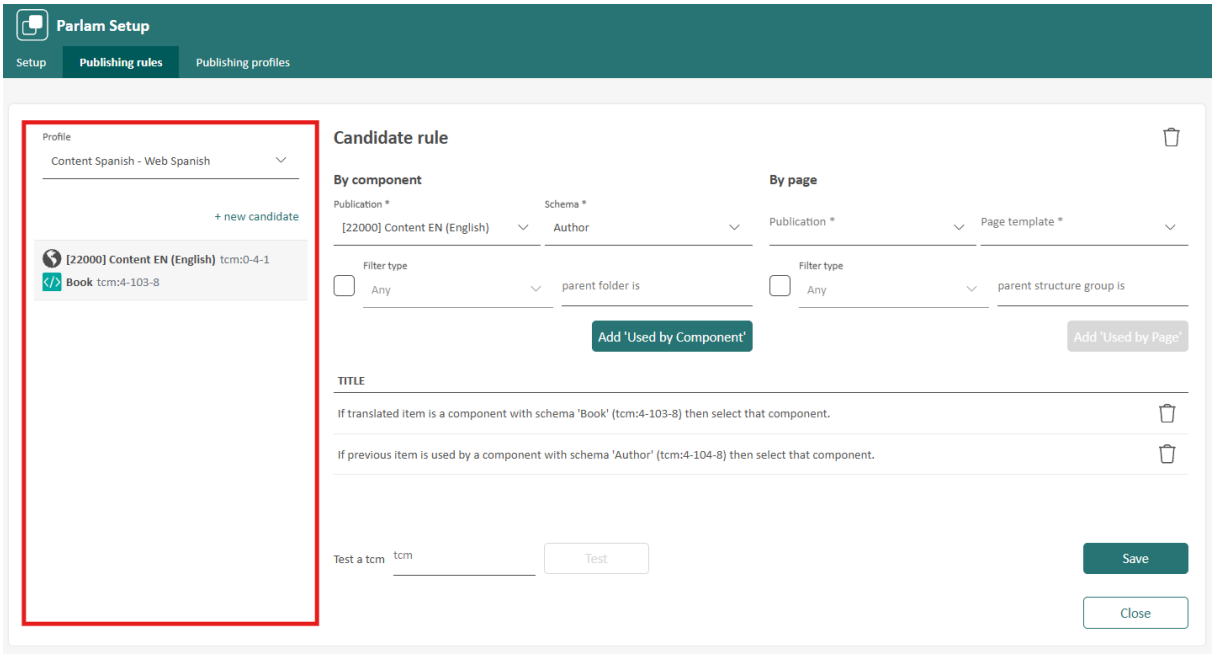
To deactivate an entire profile, use the edit icon next to its name and clear **Enabled**: only active profiles are used. The same combination of translated content and target publication can only be added once.

3.3.2 Publishing rules

A publishing rule, which is called a **candidate** on screen, describes what Tridion must publish when a translated item arrives, following where that item is used.

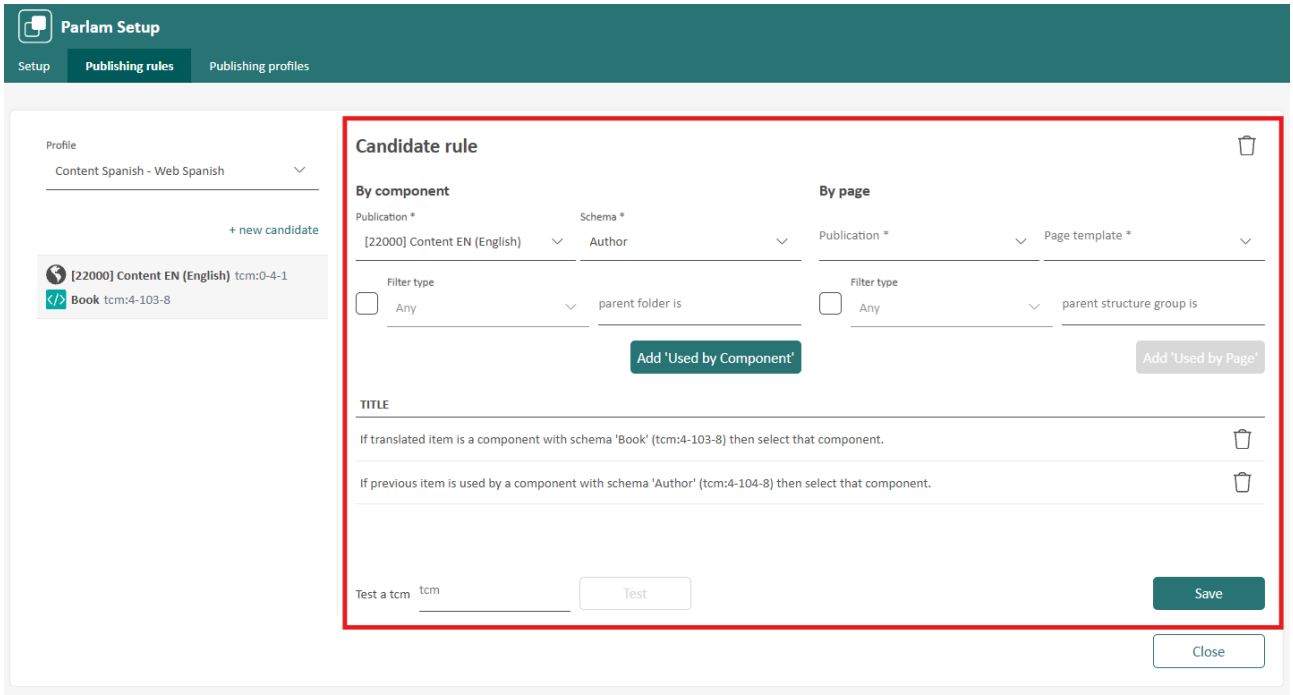
1. In **Parlam Setup**, open the **Publishing rules** tab.
2. In **Profile**, choose the publishing profile the rules belong to.
3. Click **+ New candidate**.

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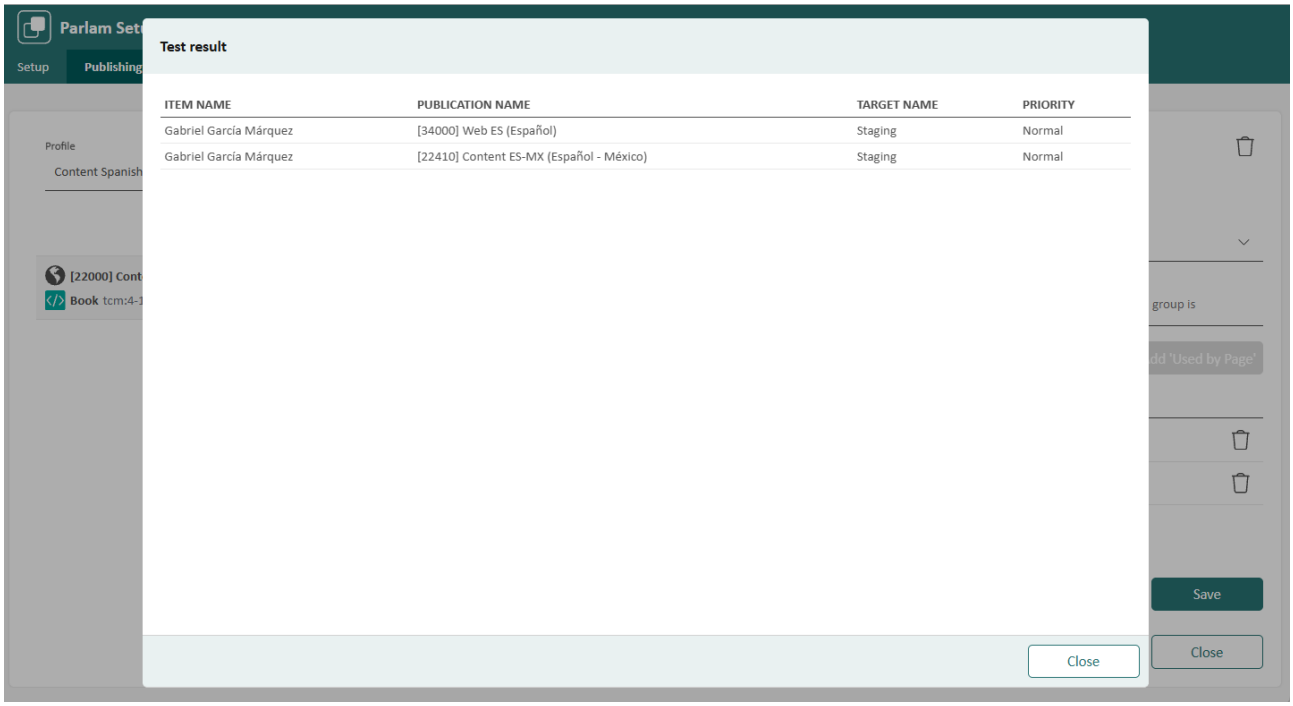
4. In the **Candidate rule** panel, build the chain of rules:
   - **By component**: choose the **Publication** and the **Schema** and click **Add 'Used by Component'**. This adds the components of that schema that use the item.
   - **By page**: choose the **Publication** and the **Page template** and click **Add 'Used by Page'**. This adds the pages with that template that use the item. A page rule must be the last one in the chain.
   - If you want, turn on a rule's filter and choose a **Filter type** with the TCM URI of a folder (**parent folder is**) or of a structure group (**parent structure group is**), to limit it to the items stored there.
5. The rules appear in the list, each with a title that describes it. Use its delete button to remove it.
6. Click **Save**. A candidate needs at least one rule.

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Test a candidate

Before leaving it running, you can see what it would publish. In **Test a tcm**, enter the TCM URI of a translated component or page and click **Test**. The **Test result** dialog box shows you the publishing actions that would be performed, with **Item name**, **Publication name**, **Target name** and **Priority**; if there are none, you will see *No publishing instructions*. The test does not publish anything.



3.3.3 How publishing works

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When a translated language is written to Tridion, its items are queued for publishing. In the connector's next run, every 5 minutes, each item is compared with the candidates of the active profiles, and the result is published to the target of the matching profile rule, with its priority.

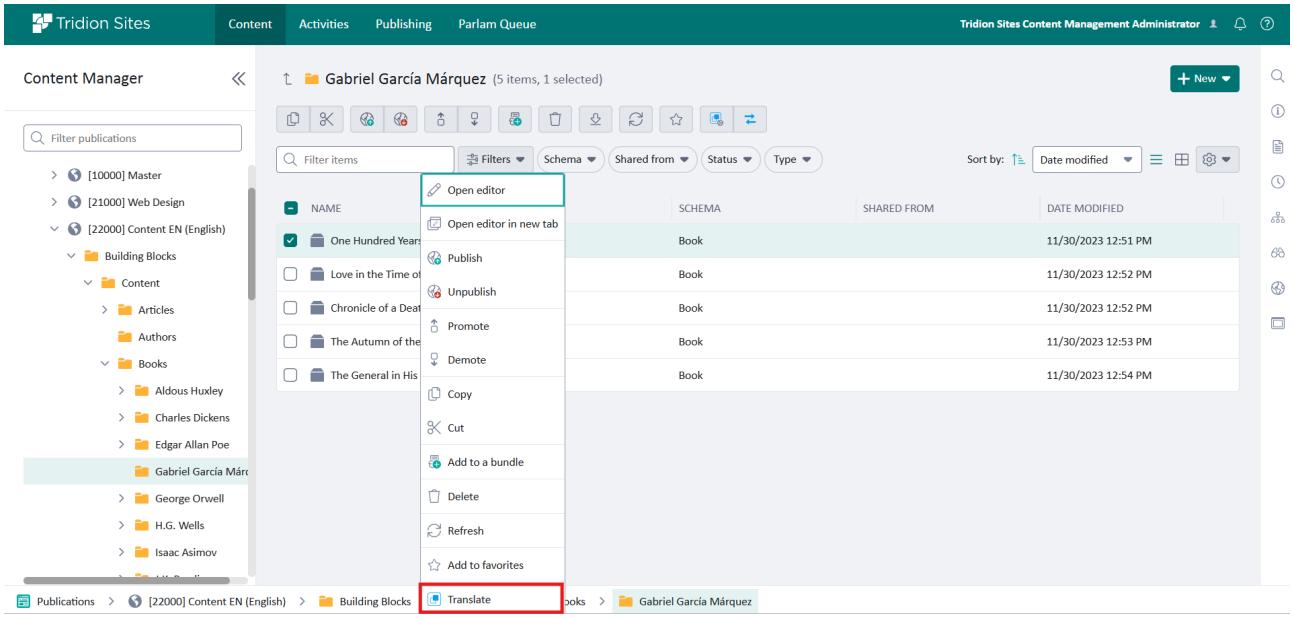
If an item cannot be published, for example because it no longer exists, the problem is recorded in the connection's activity log in Parlam, and the translation stays in Tridion. You can always publish the translated content yourself from Tridion, as you always do.

3.4 Translating your content, step by step

This part is for those who translate content from Tridion day to day. To use the connector you must be in the **Parlam Users** group.

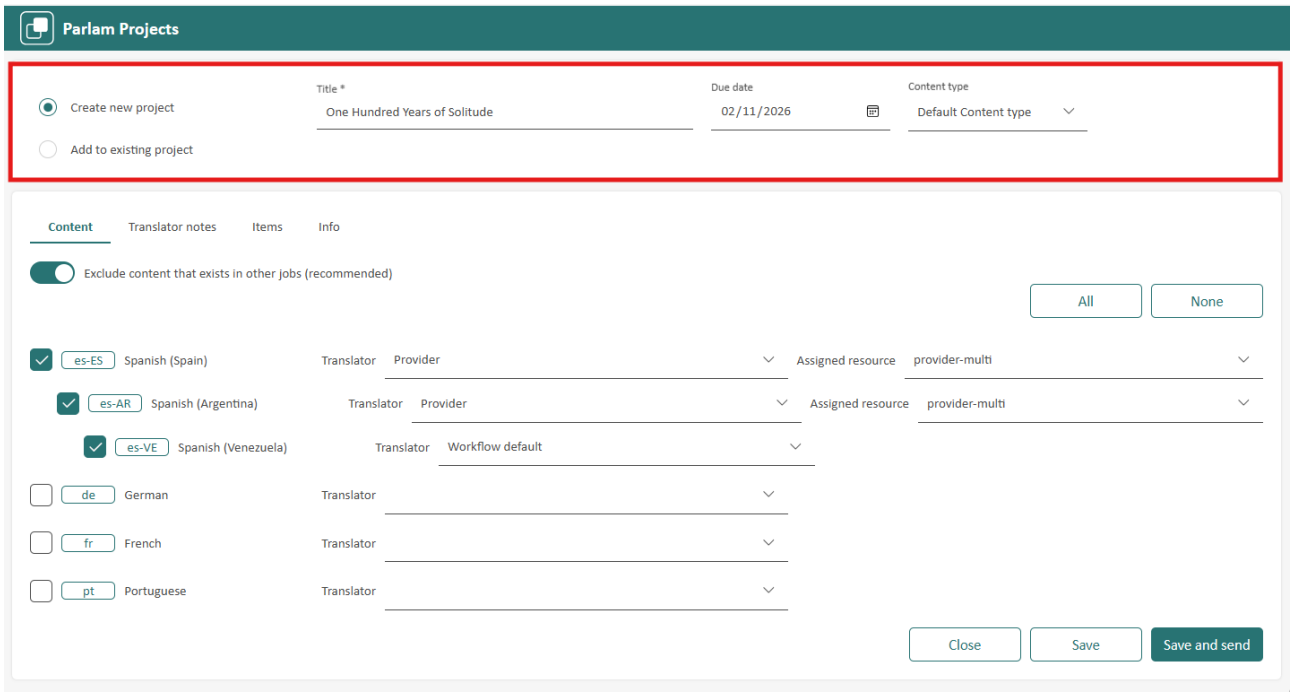
3.4.1 Send content for translation

1. In Tridion Experience Space, open the content explorer and go to the **source publication**.
2. Select what you want to translate: components, pages, folders, structure groups, categories or keywords. Everything must be in the same publication.
3. Right-click the selection and choose **Translate**.



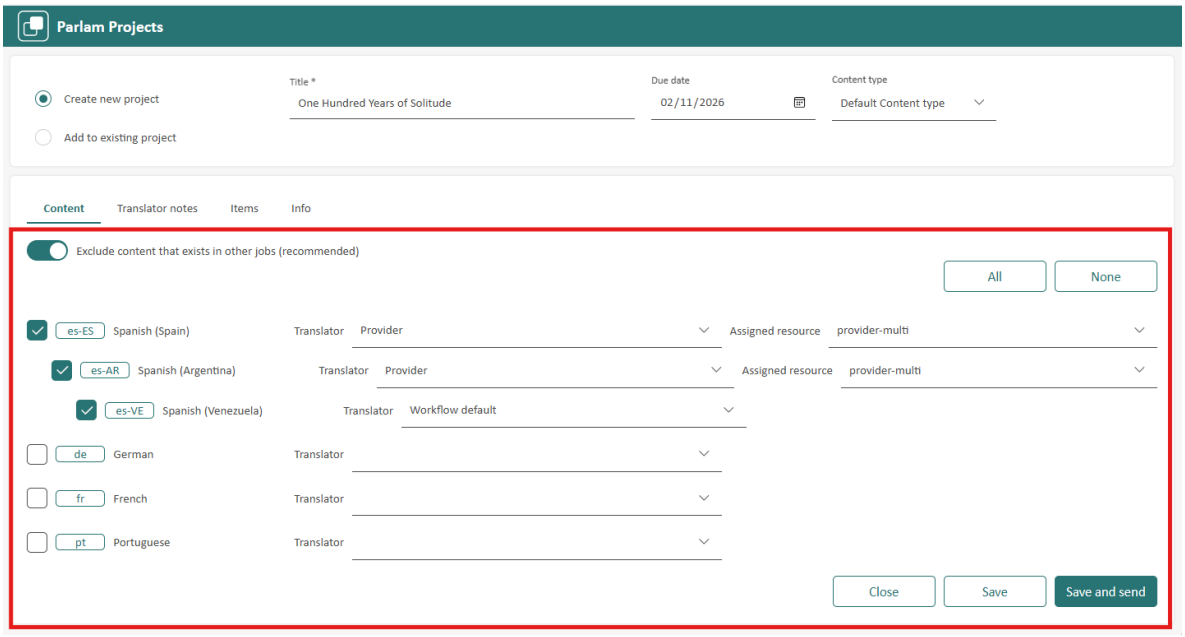
4. The **Parlam Projects** window opens with a proposed project. At the top, **Create new project** is selected; review:
   - **Title**: it is proposed from the first item; change it if you want.
   - **Due date**: Parlam proposes it based on the workflow; change it if you need the translation sooner or later.
   - **Content type**: it only appears if the workflow lets you choose it.

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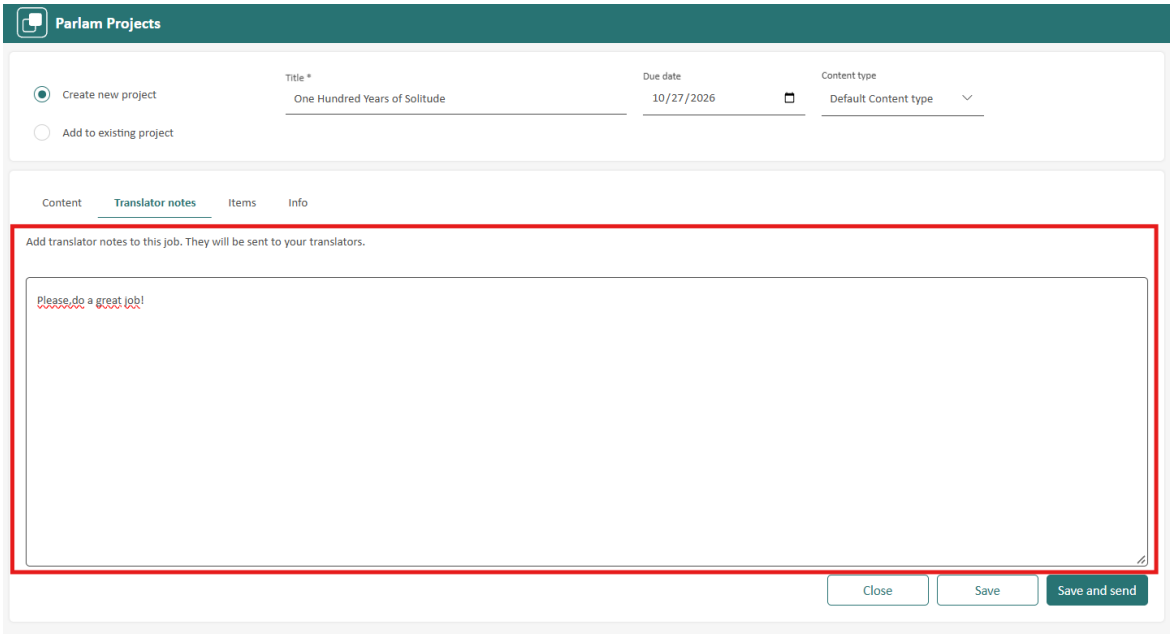


5. In the **Content** tab:
   - Leave the **Exclude content that exists in other jobs (recommended)** option turned on, so you don't send items twice that are already being translated into the same language in another project.
   - Select the target languages. Those selected by default in the setup are already selected; use **All** or **None** to change them all at once. If you clear a language, its child languages are also cleared.
   - For each language, choose who translates in **Translator**: **Workflow default**, **User**, **Group**, **Provider**, **Smart assignment**, **MT profile** or **RAG profile**. In some cases you will also have to choose the **Assigned resource**. If you don't choose anything, **Workflow default** is applied.

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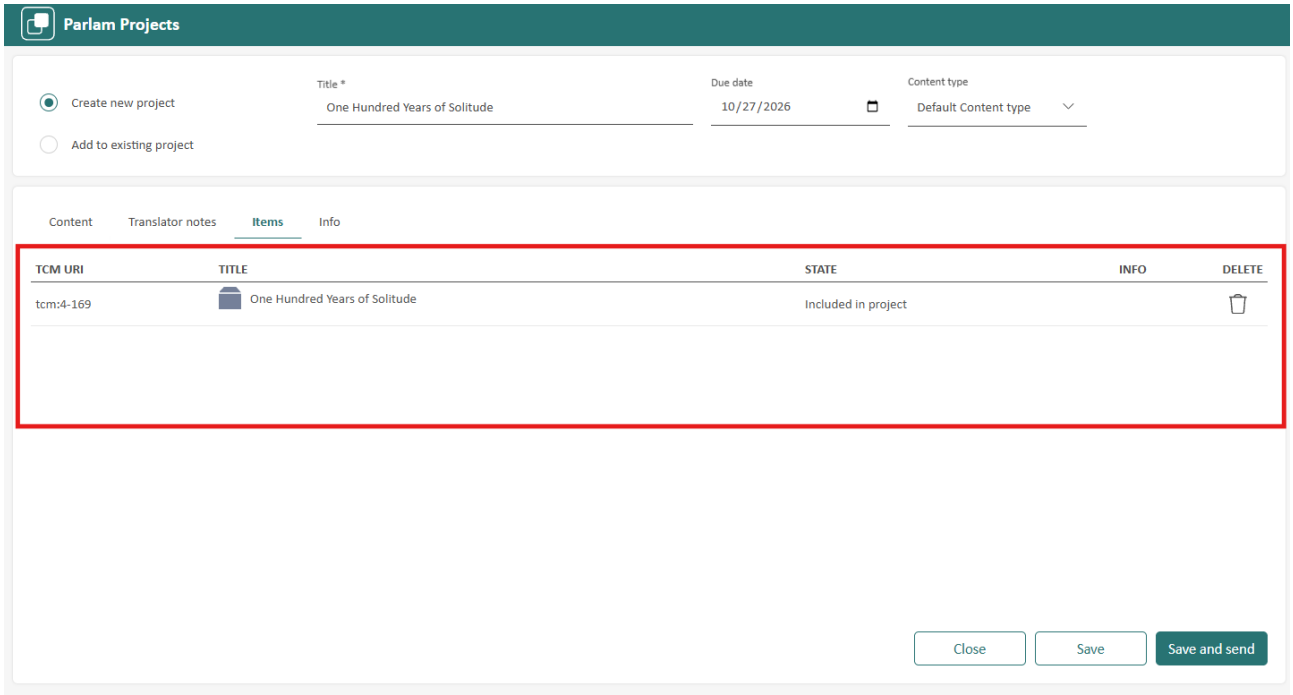


6. If you want to give instructions to the translators, write them in the **Translator notes** tab.

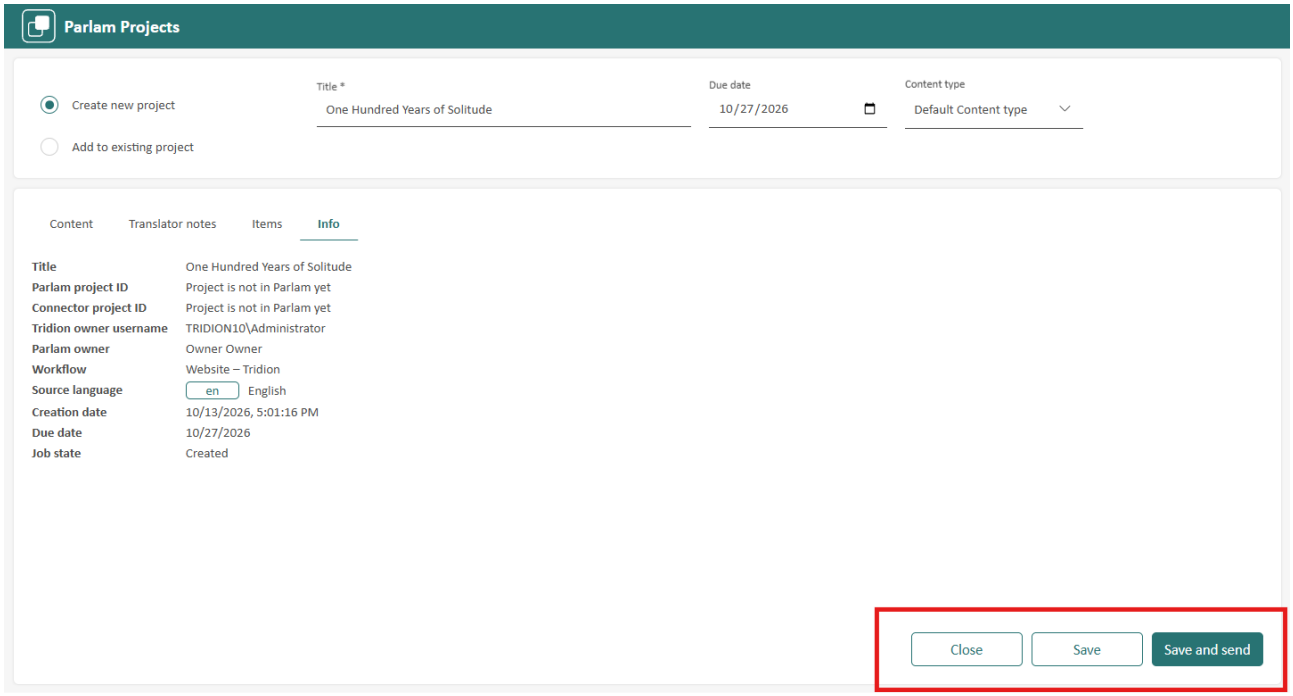


7. In the **Items** tab, review the items. Each one shows its **TCM URI**, **Title** and **State**: **Included in project** if it is going to be translated, or **Excluded from project** if it cannot be translated, for example because its type or its schema is not enabled in the setup, or because the project already has the maximum number of items. If you want to remove an item, use its delete button.

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8. Click **Save and send** to send the project for translation, or **Save** to save it as a draft and send it later from the queue. The window closes and, when you save, you will see *Saved successfully*.

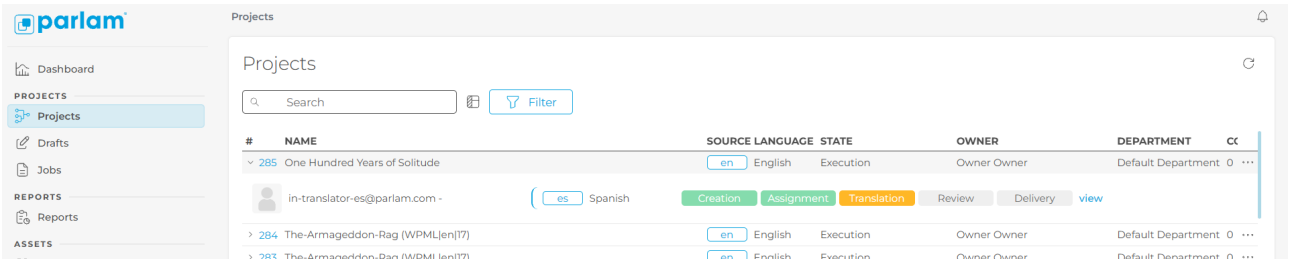


Add items to a draft. If you already have a saved, unsent project (in **Created** state) from the same publication, you can add items to it instead of creating a new one. Select the items, choose **Translate** and, at the top, select **Add to existing project** and select the draft in **Existing project**; then save or send. This option only appears when you create a new project, and it is disabled (grayed out) if you have no unsent draft.

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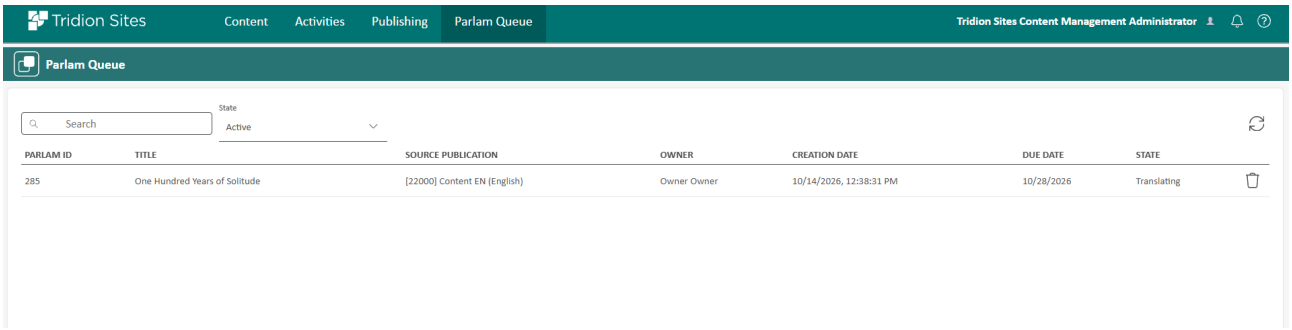
3.4.2 What happens in Parlam

When you send the project, it is queued and, in about 5 minutes, the connector creates it in Parlam with all the languages you chose. From there it follows the workflow: approval, if needed, translation, review and delivery. If you translate in a chain, each child language is created as a separate project that waits for its parent language to be delivered; in the meantime you will see it as **Waiting for parent**.



3.4.3 Track progress

1. Click **Parlam Queue**, in the Tridion header.
2. You will see the projects with their **Parlam Id**, **Title**, **Source publication**, owner, creation date, **Due date** and **State**. You can search, filter by state (**Active** shows all those that have not finished) and update the list with the refresh button.



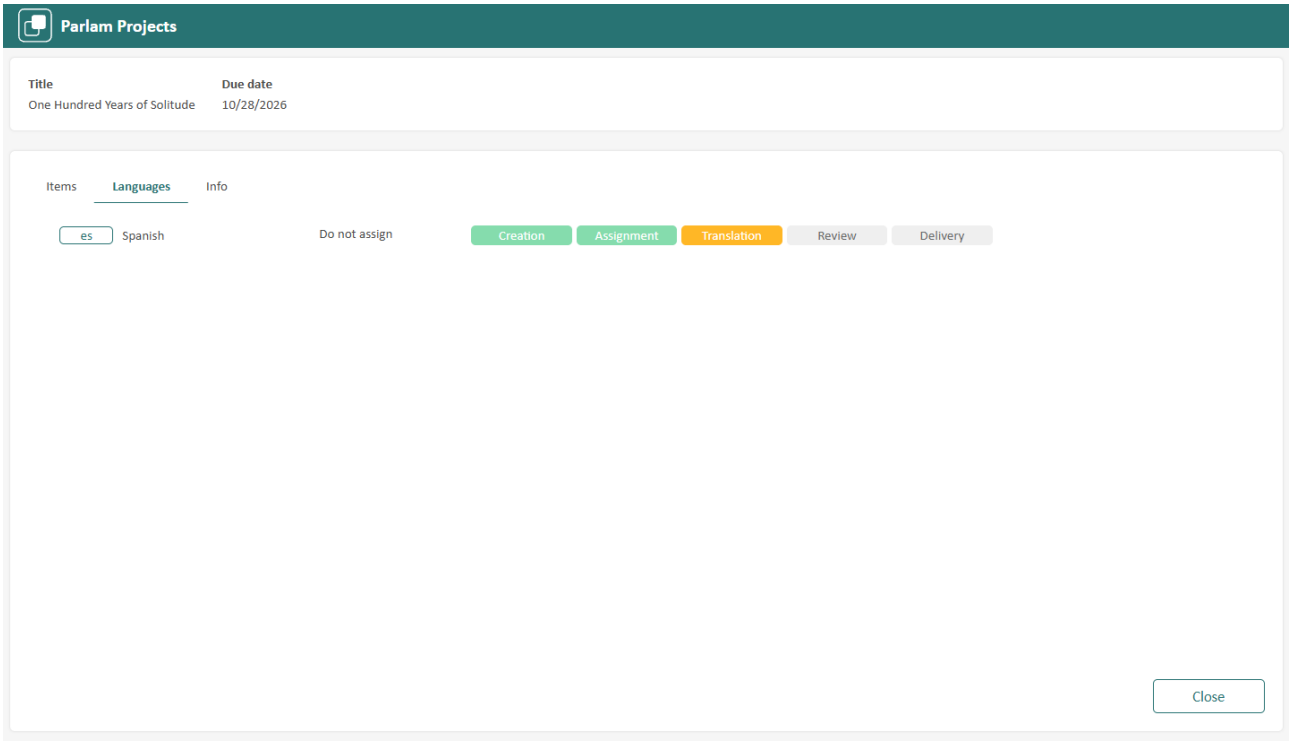
State	What it means
Created	It is a draft; it has not been sent yet.
Queued for feed	It has been sent and is waiting for the connector to extract its content.
Queued for send	The content has already been extracted and is waiting to be sent to Parlam.
Waiting for parent	It is a child language waiting for its parent language to be delivered.
Translating	The project is in Parlam, being translated or reviewed.
Completed	All languages have been delivered and written to Tridion.

If you see a red **Error** label next to the state, something has gone wrong; open the project to see the message.

3. Click a project to open it. If it is a draft (**Created**), it opens so you can change it and send it with **Save and send**. If it has already been sent, it opens in read-only mode, with the **Items**, **Languages** and **Info** tabs. In **Languages** you will see which phase each language is in in Parlam and, if any has a

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problem, **Show error** shows it to you. In **Info** you will see the **Parlam project ID**, the owner's Tridion and Parlam user, the **Workflow**, the dates, the **Job state** and, if there is one, the last error.



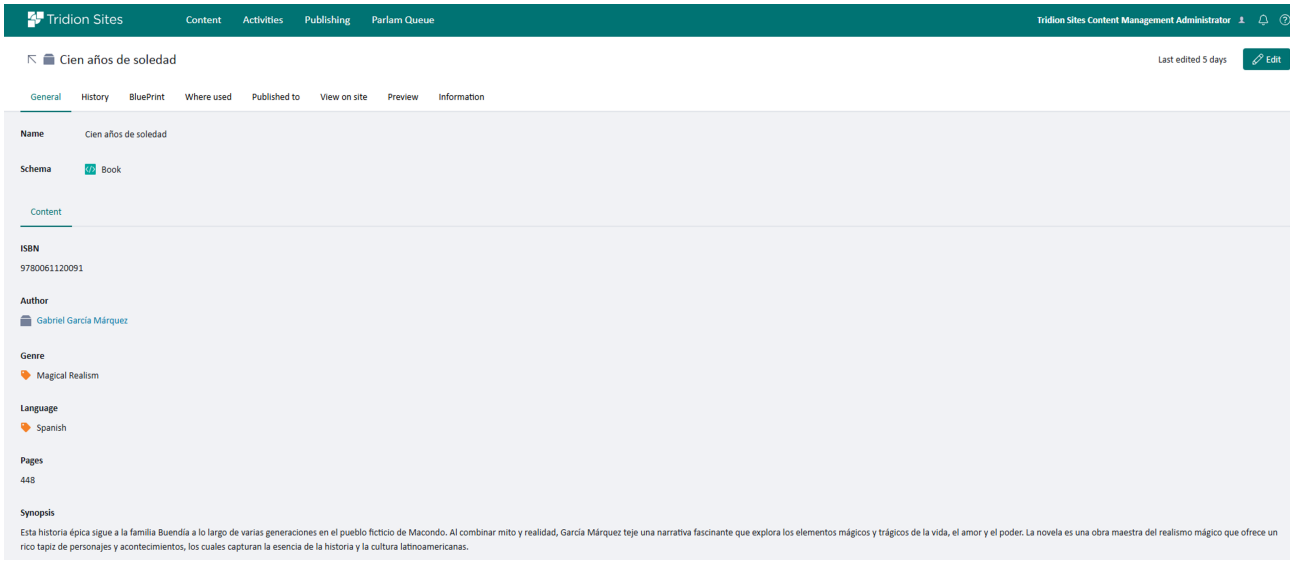
If you have access to Parlam, you can also track the same projects in **Projects** and **Jobs**, and receive email notifications.

3.4.4 Receive and review the translation

You don't have to do anything to receive it. When a language reaches the **Delivery** phase in Parlam, the connector collects it within about 5 minutes and writes it to that language's publication: it localizes the item if it was not localized yet, updates only the translated fields, leaves the rest as they were and makes the rich text links point to the target publication. If you use publishing from Parlam, the content is then published according to your rules.

To review it, open the item in the target publication.

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Keep in mind that, because the translated item is localized in the target publication, it no longer inherits the changes you make to the original afterwards.

If a language cannot be written to Tridion, nothing from that language is written, the delivery is not confirmed in Parlam and the project shows the error. Once the cause is fixed, a project manager can use **Reopen delivery** or **Retry delivery** in Parlam so the connector collects the translation again.

When you change an item that was already translated, send it again as described in section 3.4.1. Parlam creates a new project and, thanks to the translation memory, reuses the text that has not changed, so only the new or modified text is translated. The new translation overwrites the translated fields in the target publication.

3.4.5 When something goes wrong

When creating a project

Message	What to do
All selected items must belong to the same publication.	Select items from a single publication.
Content of this publication cannot be translated. Select the items in the source-language publication.	You selected items from a target publication. Go to the source publication.
No configuration was found for this publication. Please contact your administrator.	The publication has no setup. Ask an administrator to create one.
One of the selected items no longer exists in Tridion.	Refresh the content explorer and select the items again.
The workflow configured for this publication is stopped in Parlam. Contact your administrator.	The workflow is stopped. It must be started in Parlam.
This connection is not authorised for the configured workflow. Please contact your administrator.	The setup's workflow is not selected in the Content Hub profile.
Your user is not mapped to a Parlam user for this workflow. Contact your administrator.	Your Tridion username is not in the user mapping. Ask to be added.

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Message	What to do
Your Parlam user is not a member of this workflow's department. Contact your administrator.	Your Parlam user is not in the workflow's department. Ask to be added.
The Tridion user has no username to map to Parlam.	Your Tridion user has no username. Talk to your Tridion administrator.
Tridion could not be reached. Please try again in a few minutes.	Temporary network problem. Try again later.
Parlam could not be reached. Please try again in a few minutes.	Temporary network problem. Try again later.
Session expired – This window's session has expired. Close it and open Parlam again from Tridion.	Parlam windows last one hour. Close it and open it again from Tridion.
No access to Parlam	You are not in any of the Parlam groups. Ask to be added to **Parlam Users**.

After sending the project

These errors appear in the queue with the **Error** label:

Message	What to do
This project has no content. Please check that the schemas of the included items have at least one translatable field selected in the setup.	Select fields for those schemas in the setup and send the project again.
Sending this project to Parlam failed <N> times, so it is no longer being retried (<reason>). Fix the cause and send the project again.	Fix the cause indicated in the message and send the project again.
Setup [<id>] has no target publication for language [<language>], so the translated items of project [<id>] cannot be localized for publishing.	A language of the project has no target publication in the setup. Fix the setup's target languages.
<N> translated segment(s) of project [<id>] language [<language>] have no matching field in their Tridion item and would be lost: <fields>.	The schema of an item changed while it was being translated, and nothing from that language was written. Talk to your administrator.
The Parlam project <number> no longer exists, so this project can no longer be translated. It has been taken out of the queue.	The project was deleted in Parlam. Send the content again.

Can't see the Translate option? Check that you are in the **Parlam Users** group, that everything you selected is of a type that can be translated and that your browser allows pop-up windows from Tridion.

Delete a project. In the queue, use the project's delete button and confirm. The project disappears from the queue, but nothing is deleted or canceled in Parlam: if it had already been sent, it carries on there. If it needs to be canceled, ask the project manager in Parlam.

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4 Support

If you have any questions or something doesn't work as you expect, write to us at **support@parlam.com**. We will help you solve it.

So we can help you as quickly as possible, tell us in your message the name of your Parlam account and of the Content Hub profile, what you were doing when the problem appeared and, if you see an error message, copy it exactly or attach a screenshot.

For your security, never send us tokens, usernames, passwords, keys or any other access details, either for Parlam or for Tridion. We don't need them to help you, and nobody from Parlam will ask you for them.

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