1 Welcome to the Lionbridge Connector for Relativity

Welcome to the Lionbridge Connector for Relativity (Connector). This is Lionbridge’s connector between Relativity and either Lionbridge Freeway or an FTP/SFTP server.

1.1 Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freeway</td>
<td>A Lionbridge translation portal and a translation provider.</td>
</tr>
<tr>
<td>Lionbridge</td>
<td>The publisher of the Freeway translation portal and a translation provider. Users connect to the Freeway translation portal to submit content to and retrieve content from the Lionbridge translation provider.</td>
</tr>
<tr>
<td>Lionbridge Connector for Relativity (Connector)</td>
<td>The connector software that Lionbridge has developed and provides that plugs into your Relativity workspace to provide connectivity to the Lionbridge Freeway translation portal. In this document it is referred to as the Connector. This is the software you are installing and configuring as you work through this document.</td>
</tr>
<tr>
<td>Relativity</td>
<td>An e-discovery software solution.</td>
</tr>
<tr>
<td>Source language</td>
<td>The original language of the document. Content is translated from the source language.</td>
</tr>
<tr>
<td>Submission Set</td>
<td>One or more documents grouped together into a single translation job. All items in the job have the same source and target languages, translation-provider and related configuration, and metadata.</td>
</tr>
<tr>
<td>Target language</td>
<td>The translated language of the document. Content is translated into the target language.</td>
</tr>
</tbody>
</table>

1.2 Using this Guide

Purpose of this guide

This guide describes everything you need to know to install and configure the Lionbridge Connector ("Connector") for Relativity. It describes the delivery package contents, system requirements, installation instructions, and configuration procedures.

Recommendation: Review the user guide to fully understand the powerful features of the Connector.
Who should use this guide
This guide is intended for Relativity administrators and system integrators.

What you should already know
This document assumes that your company is already using Relativity and has a workspace set up. It assumes that you have a strong working knowledge of the Relativity workspace and features. It assumes that Lionbridge Freeway is already set up for your company.

How to find out more about the Lionbridge Connector for Relativity
- For information on using the Lionbridge Connector to send and receive documents for translation from Relativity, read the Lionbridge Connector for Relativity User Guide.
- For information on retrieving documents for translation from the Lionbridge Connector on an FTP or SFTP server, and returning translated content to the Connector, read the Lionbridge Connector for Relativity Translator Guide for FTP/SFTP Users.

Documentation conventions
This guide uses the following conventions:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Highlights screen elements such as buttons, menu items, and fields.</td>
</tr>
<tr>
<td><strong>Courier</strong></td>
<td>Highlights input, file names, and paths.</td>
</tr>
<tr>
<td><strong>Italics</strong></td>
<td>Highlights terms to emphasize, variables, or document titles.</td>
</tr>
</tbody>
</table>

1.3 How to Contact Lionbridge Connector Support
Email: connectors@lionbridge.com
Telephone: +1-416-363-0888
You can submit a support ticket either:
- by email
- from the Lionbridge Connector Zendesk page, using your web browser
To submit a support ticket:

1. Do one of the following:
   - Email connectors@lionbridge.com, and cc (carbon copy) anyone to include in the ticket correspondence.
     
     **Important:** Include the information and attachments in your email that are listed in the sub-sections below.
   
   - Create a ticket in Zendesk:
     a. Open the Lionbridge Connector Zendesk page in your browser:
     b. Sign in to Zendesk. If you do not have sign-in credentials, see "To view and update your support ticket in Zendesk:" below.
     
     **Important:** Include the information and attachments that are listed in the sub-sections below.
     c. Click Submit a request.
     d. In the CCs field, add anyone to include in the ticket correspondence.

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

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

When the issue is resolved, Lionbridge closes the ticket.

**Information to include in the support ticket:**

- client name
- CMS or content system name and version
- Connector or App version installed
- name of job for which the issue occurs
- date of job submission
- detailed description of the issue
- any error text—copy and paste, if applicable
Files to attach to the support ticket:
- CMS log files for the date the issue occurred
- Connector or App log files for the date the issue occurred
- Screen capture of the issue

To view and update your support ticket in Zendesk:

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

1. Open the Lionbridge Connector Zendesk page in your browser: [https://connectors.zendesk.com](https://connectors.zendesk.com).
2. In the top-right corner, click **Sign in**, and enter your credentials.

![Sign in to Lionbridge Connectors](image)

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

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

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

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


A Relativity administrator can install the Connector to any workspace within a Relativity instance.
3 Installing the Connector

A Relativity administrator must install the Connector.

To install the Connector:

1. Select the workspace where you want to install the Connector.

2. Install the .RAP file to that workspace.

**Note:** Installing the Connector automatically creates the Lionbridge Connector agents. For descriptions of these agents, see "Connector Agents" on page 23.
4 Configuring the Connector

To configure the Connector, complete the following tasks:

1. You configure the translation providers to use. For details, see "Configuring Translation Providers" on page 11.

2. You configure target languages for each translation-provider configuration. For details, see "Configuring Target Languages" on page 15.

3. You configure source languages for each translation-provider configuration. For details, see "Configuring Source Languages" on page 18.

4. You configure the SMTP settings for the email address that sends out email notifications. For details, see "Configuring SMTP Settings for Email Notifications" on page 22.

4.1 Configuring Translation Providers

You configure a translation provider for the Connector by creating a Lionbridge Admin Configuration. You must create at least one configuration for each translation provider to which you will send files for translation.

**Note:** You can create multiple configurations for a translation provider. This is useful, for example, if you are delivering files for translation to multiple FTP or SFTP servers.

**To configure a translation provider:**

1. In Relativity, click the workspace where the Connector is installed.

2. In the Lionbridge Connector tab, click the Admin Configuration child tab.
3. In the top-left corner, click the **New Lionbridge Admin Configuration** button to open the Lionbridge Admin Configuration Layout dialog box.

![Lionbridge Admin Configuration Layout dialog box]

4. In the **Admin Configuration** section, in the **Configuration Type** dropdown list, select the type of translation provider to configure. This is one of:
   - **Freeway**: The Connector delivers content for translation to Lionbridge Freeway.
   - **SFTP**: The Connector delivers content for translation to a secure FTP server.
   - **FTP**: The Connector delivers content for translation to an FTP server.

   The **Admin Configuration** section updates based on your selection.

   - If **Freeway** is selected, the section is displayed as follows:

     ![Freeway configuration section]
If **SFTP** or **FTP** is selected, the section is displayed as follows:

![Diagram of SFTP or FTP configuration](image)

5. Enter the following configuration information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The username of the web service credentials in Lionbridge Freeway, which the Lionbridge Freeway team provides to you. <strong>Tip:</strong> Freeway refers to the username as the key.</td>
</tr>
<tr>
<td>Description</td>
<td>A user-friendly description of this configuration.</td>
</tr>
<tr>
<td>Authentication Endpoint</td>
<td>The URL for Freeway Web service authentication. <strong>Note:</strong> Displayed only if Freeway is the selected configuration type, above.</td>
</tr>
<tr>
<td>Service Endpoint</td>
<td>The URL for Freeway Web service requests. <strong>Note:</strong> Displayed only if Freeway is the selected configuration type, above.</td>
</tr>
<tr>
<td>Server Endpoint</td>
<td>The endpoint URL of the SFTP or FTP server. <strong>Note:</strong> Displayed only if either SFTP or FTP is the selected configuration type, above.</td>
</tr>
<tr>
<td>Port</td>
<td>The port for connecting to the FTP or SFTP server. <strong>Note:</strong> Displayed only if either SFTP or FTP is the selected configuration type, above.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Destination Folder</td>
<td>The root folder of the SFTP or FTP server, where the Connector delivers content for translation and receives translated content.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Displayed only if either SFTP or FTP is the selected configuration type, above.</td>
</tr>
<tr>
<td>User Name</td>
<td>User name applies to FTP and SFTP configurations</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Displayed only if either SFTP or FTP is the selected configuration type, above.</td>
</tr>
<tr>
<td>New Password</td>
<td>The password of the web service credentials in Lionbridge Freeway, which the Lionbridge Freeway team provides to you.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> Freeway refers to the password as the secret.</td>
</tr>
<tr>
<td>Confirm New Password</td>
<td>Re-enter the password from the New Password field, described above.</td>
</tr>
<tr>
<td>Submit XML</td>
<td>Background: The Connector sends a file to Freeway for translation in its native form, for example, as a .docx, .pdf, or .txt file. Select this check box to send the file to Freeway as an .xml file if the native file format is not specified.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Displayed only if Freeway is the selected configuration type, above.</td>
</tr>
<tr>
<td>Expiration Period in Days</td>
<td>Specify the number of days, after which a submission set will be considered inactive, if no action occurs (it applies for Freeway configuration).</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Displayed only if Freeway is the selected configuration type, above.</td>
</tr>
</tbody>
</table>

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

**Tip:** To edit an existing Lionbridge Admin Configuration, click the **Edit** link beside it.

For instructions on changing who can configure the Connector, see “Changing Permissions for Configuring Translation Providers” on page 15.
4.1.1 Changing Permissions for Configuring Translation Providers

You can change the permissions of who can configure the Connector by changing the permissions for the **Admin Configuration** tab.

**To change the permissions for the Admin Configuration tab:**

1. In Relativity, create a group. Add the users to the group to whom you want to give access to the **Admin Configurations** tab for the Connector. For detailed instructions, refer to the Relativity documentation: [https://help.relativity.com/9.5/Content/Relativity/Groups.htm](https://help.relativity.com/9.5/Content/Relativity/Groups.htm).

2. Navigate to a workspace where the Connector is installed.

3. Add the group you created to the workspace.
   a. Click **Edit Permissions** for your group.
   b. Under **Tab Visibility**, navigate to the **Admin Configuration** tab and select it.
   c. Click **Save**.
   d. Close the Workspace Security View.


4.2 Configuring Target Languages

You must configure one or more target languages. A **target language** is a language into which the documents are translated. Documents are translated from a **source** language into a **target** language.

A target language must be defined separately for each translation-provider configuration. For information on creating a translation-provider configuration, see "Configuring Translation Providers" on page 11.

**To configure a target language:**

1. In Relativity, click the workspace where the Connector is installed.
2. Click the Lionbridge Connector tab and then click the Target Language child tab.

3. Click New Lionbridge Target Language.

   The Lionbridge Target Language Layout dialog box opens.

4. Enter the following information in the Target Language section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of this target language. This is the name displayed when users send out content for translation and select a target language.</td>
</tr>
<tr>
<td>Sync Configuration</td>
<td>Required. Select the translation-provider configuration for this target language. For details, see &quot;Configuring Translation Providers&quot; on page 11.</td>
</tr>
</tbody>
</table>

5. Click Save.

### 4.2.1 Viewing Configured Target Languages

You can view all configured target languages for the Connector. A target language is a language into which the documents are translated. Documents are translated from a source language into a target language. Each target-language configuration is associated with a particular translation provider configuration (sync configuration).

To view configured target languages:

1. In Relativity, click the workspace where the Connector is installed.
2. Click the **Lionbridge Connector** tab and then click the **Target Language** child tab.

The tab displays all target languages configured in the Connector.

3. In the dropdown list beside the **New Lionbridge Target Language** button, you can filter the list of target languages by the type of translation provider.

   - To view only target languages configured for delivery to translation providers using SFTP or FTP servers, select **SFTP/FTP Target Languages**.
   - To view all configured target languages, select **All Lionbridge Target Languages**.

4. You can view the following information about configured target languages:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of this target language. This is the name displayed when users send out content for translation and select a target language.</td>
</tr>
<tr>
<td>Sync Configuration</td>
<td>Required. The translation-provider configuration for this target language. For a detailed description, see &quot;Configuring Translation Providers&quot; on page 11.</td>
</tr>
<tr>
<td>Supported Source Languages</td>
<td>A source language configured for this translation-provider configuration and supported for this target language.</td>
</tr>
</tbody>
</table>

5. You can perform the following actions in this tab:

   - To edit a configured target language, click the corresponding **Edit** link.
   - To add a configured target language, click **New Lionbridge Target Language** at the top of the page.

   For detailed instructions, see "Configuring Target Languages" on page 15.
4.3 Configuring Source Languages

You must configure one or more source languages. A source language is the original language of documents, from which the documents are translated. Documents are translated from a source language into a target language.

A source language must be defined separately for each translation-provider configuration. For information on creating a translation-provider configuration, see “Configuring Translation Providers” on page 11.

To configure a source language:

1. In Relativity, click the workspace where the Connector is installed.

2. Click the Lionbridge Connector tab and then click the Source Language child tab.

3. Click New Lionbridge Source Language.

The Lionbridge Source Language Layout dialog box opens.

4. Enter the following information in the Source Language section:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of this source language. This is the name displayed when users send out content for translation and select a source language.</td>
</tr>
</tbody>
</table>
5. In **Available Target Languages**, you select one or more target languages into which files will be translated from this source language. The target languages that are available for selection are defined for the translation-provider configuration you selected in the **Sync Configuration** dropdown list, described above. For details, see "Viewing Configured Target Languages" on page 16.

   a. Click the ellipsis button to open the **Select Items - Available Target Languages** dialog box.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sync Configuration</td>
<td>Required. Select the translation-provider configuration for this source language. For details, see &quot;Configuring Translation Providers&quot; on page 11.</td>
</tr>
</tbody>
</table>
Note: The ellipsis button is available only after selecting a **Sync Configuration**, as described in the previous step.

b. In the top part of the dialog box, select the check boxes for the target languages to configure for this source language, and click **Add**.

**Note:** The **Add** button is available only when at least one target language is selected.

The selected target languages are now displayed at the bottom of the dialog box.

c. In the bottom part of the dialog box, click **Set** to save your change and close this dialog box.

The **Lionbridge Source Language Layout** dialog box reopens, displaying the source-language configuration.

6. At the top of the dialog box, click **Save** to save your changes.

### 4.3.1 Viewing Configured Source Languages

You can view all configured source languages. A **source language** is the original language of documents, from which the documents are translated. Documents are translated from a **source** language into a **target** language.

Each target-language configuration is associated with a particular translation provider configuration (**sync configuration**).

**To view configured source languages:**

1. In Relativity, click the workspace where the Connector is installed.
2. Click the Lionbridge Connector tab and then click the Source Language child tab.

The tab displays all source languages configured in the Connector.

3. In the dropdown list beside the New Lionbridge Source Language button, you can filter the list of source languages by the type of translation provider.

   - To view only source languages configured for delivery to translation providers using SFTP or FTP servers, select SFTP/FTP Source Languages.
   - To view all configured source languages, select All Lionbridge Source Languages.

4. You can view the following information about configured source languages:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of this source language. This is the name displayed when users send out content for translation and select a source language.</td>
</tr>
<tr>
<td>Available Target Languages</td>
<td>A target language configured for this translation-provider configuration and configured for this source language.</td>
</tr>
<tr>
<td>Sync Configuration</td>
<td>Required. The translation-provider configuration for this source language. For a detailed description, see &quot;Configuring Translation Providers&quot; on page 11.</td>
</tr>
</tbody>
</table>

5. You can perform the following actions in this tab:

   - To edit a configured source language, click the corresponding Edit link.
   - To add a configured source language, click New Lionbridge Target Language at the top of the page.
For detailed instructions, see “Configuring Source Languages” on page 18.

4.4 Configuring SMTP Settings for Email Notifications

You can configure SMTP settings for the email address that will send out notifications from the Connector about translation-status events. The Connector sends out notifications to the email addresses specified in a submission set when translation-status events occur. For a list and description of these events, refer to the Lionbridge Connector for Relativity User Guide.

You configure SMTP settings in Relativity’s Instance Settings tab, which is accessible to Relativity system administrators.

You must configure the following settings:

- Authentication Email From
- SMTP Password
- SMTP Port
- SMTP Server
- SMTP User Name
5 Connector Agents

The Connector includes eight agents, which are automatically created the first time that the Connector is installed on an active Agent Server.

There must be only one instance of each agent on a Relativity instance, and all agents must be enabled. The run cycle of each agent is measured in seconds.

The Connector includes the following agents:

<table>
<thead>
<tr>
<th>Agent</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lionbridge Freeway Objects Sync Agent</td>
<td>This agent synchronizes Lionbridge and Freeway platform objects, such as source languages, target languages, and translation type (which specifies a Freeway analysis code for a submission set).</td>
</tr>
<tr>
<td>Lionbridge Set Scheduler Agent</td>
<td>This agent queues scheduled submission sets for submission to the FTP or SFTP server or to Lionbridge Freeway.</td>
</tr>
<tr>
<td>Lionbridge Project Submit Agent</td>
<td>This agent submits queued submission sets to Lionbridge Freeway for translation.</td>
</tr>
<tr>
<td>Lionbridge Status Update Agent</td>
<td>This agent updates the status of submitted submission sets based on the statuses returned by the Freeway platform.</td>
</tr>
<tr>
<td>Lionbridge Consistency Check Agent</td>
<td>This agent checks the consistency of submission sets.</td>
</tr>
<tr>
<td>Lionbridge Freeway File Delivery Agent</td>
<td>This agent checks for translated submission sets from Lionbridge Freeway and delivers them to Relativity.</td>
</tr>
<tr>
<td>Lionbridge FTP Translation Download Agent</td>
<td>This agent checks for translated documents on the FTP/SFTP server and downloads them to Relativity.</td>
</tr>
<tr>
<td>Lionbridge FTP Folder Deletion Queue Agent</td>
<td>This agent checks for deleted submission sets and deletes their related folders on the FTP or SFTP server.</td>
</tr>
</tbody>
</table>
6 Uninstalling the Connector

To uninstall the Connector, you uninstall the Lionbridge Connector for Relativity application from the workspace where it is installed. For detailed instructions, refer to the Relativity documentation: