



Lionbridge for Relativity

Installation and Configuration Guide

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1 Welcome to Lionbridge for Relativity

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

1.1 Terminology

Freeway	A Lionbridge translation portal and a translation provider.
Lionbridge	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.
Lionbridge for Relativity (App)	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 App. This is the software you are installing and configuring as you work through this document.
Relativity	An e-discovery software solution.
Source language	The original language of the document. Content is translated <i>from</i> the source language.
Submission Set	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.
Target language	The translated language of the document. Content is translated <i>into</i> the target language.

1.2 Using this Guide

Purpose of this guide

This guide describes everything you need to know to install and configure Lionbridge for Relativity ("App"). 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 App.

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 Lionbridge for Relativity

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

Documentation conventions

This guide uses the following conventions:

Convention	Description
Bold	Highlights screen elements such as buttons, menu items, and fields.
<code>Courier</code>	Highlights input, file names, and paths.
<i>Italics</i>	Highlights terms to emphasize, variables, or document titles.

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

1.3.1 Submitting 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:

- Open the Lionbridge Connector Zendesk page in your browser: <https://connectors.zendesk.com>.
- Sign in to Zendesk.

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

Important: Include the information and attachments that are listed in the sub-sections below.

- Click **Submit a request**.
- In the **CCs** field, add anyone to include in the ticket correspondence.

Zendesk automatically creates a ticket and responds to everyone included in the cc field.

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.

1.3.2 Information to Include in a 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

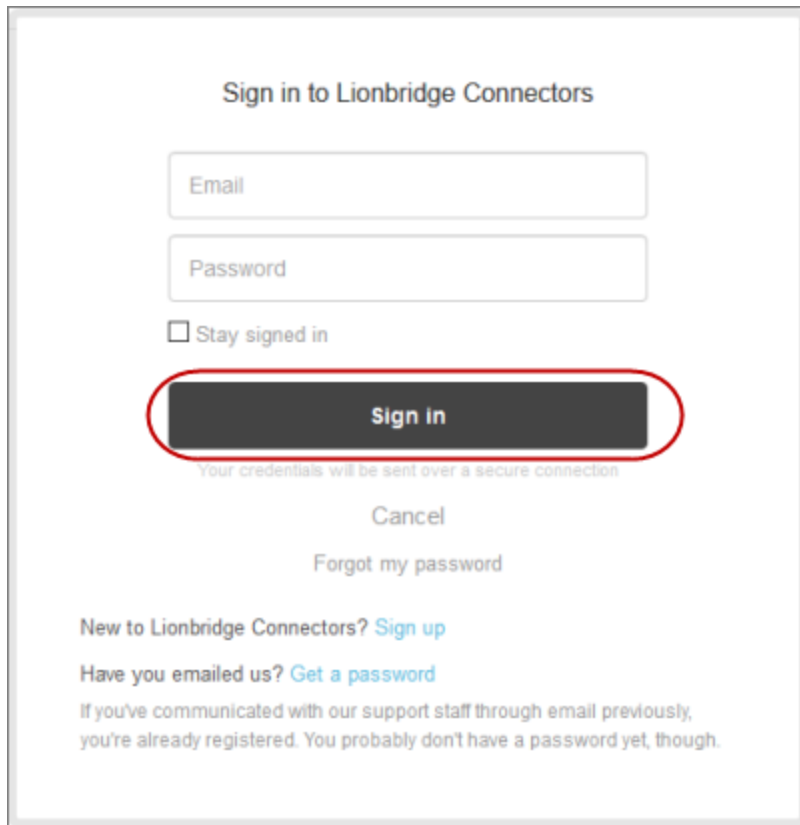
Files to attach to the support ticket:

- 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

1.3.3 Viewing and Updating 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>.
2. Enter your credentials, and click **Sign in**.



Sign in to Lionbridge Connectors

Email

Password

Stay signed in

Sign in

Your credentials will be sent over a secure connection

Cancel

Forgot my password

New to Lionbridge Connectors? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

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.

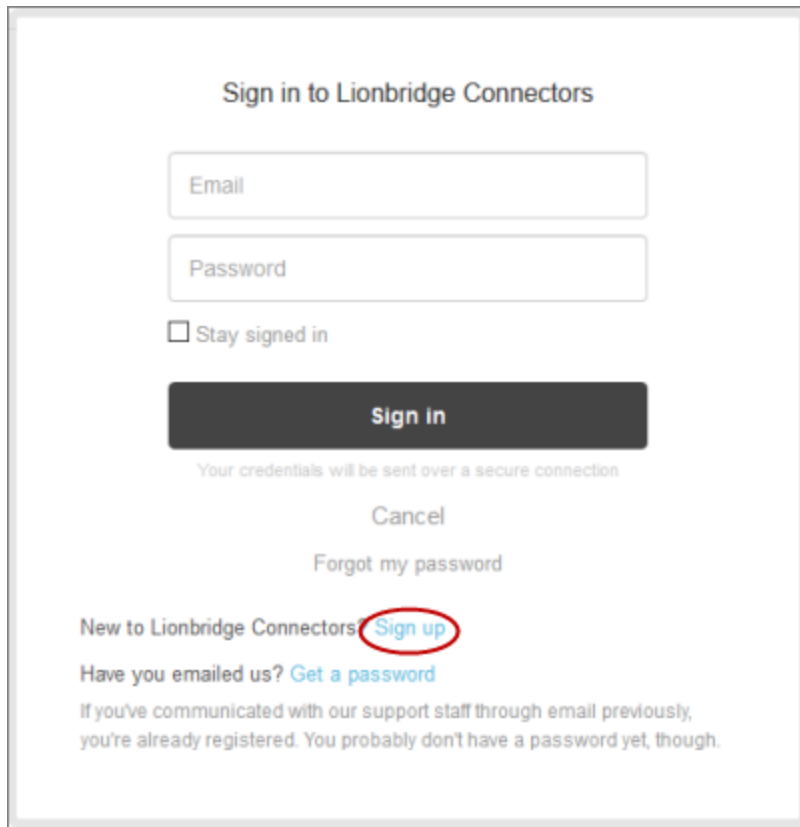
1.3.4 Signing Up for a Zendesk Account for Lionbridge Connectors

You can create a new Zendesk account for Lionbridge Connectors.

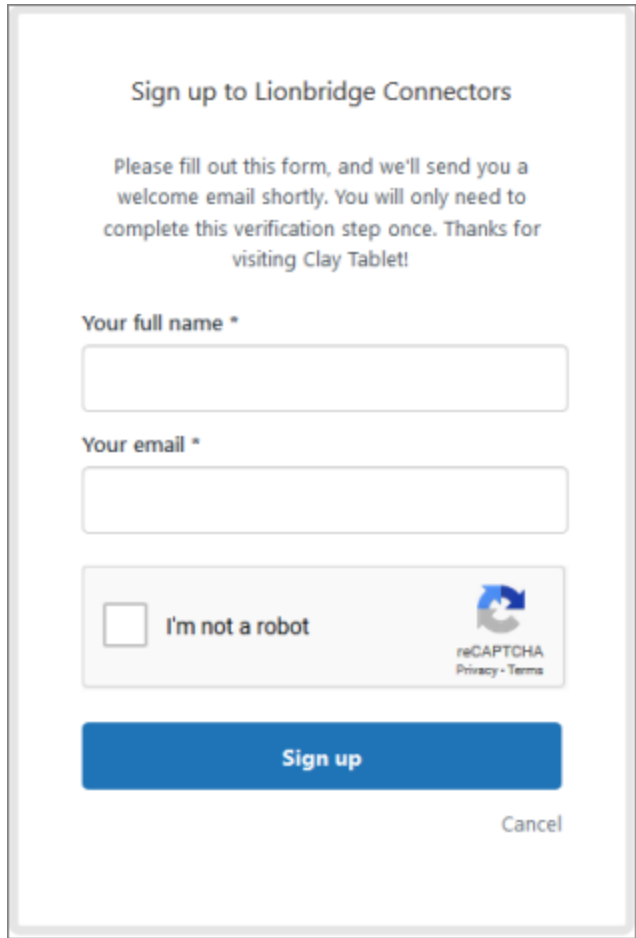
Note: If you have previously emailed Lionbridge Connectors Support at connectors@lionbridge.com to create a support ticket, you can get a password for your email account. For detailed instructions, see "How to Get a Password if You Have Previously Emailed Lionbridge Connectors."

To sign up for a Zendesk account:

1. Open the Lionbridge Connector Zendesk page in your browser: <https://connectors.zendesk.com>.
2. Click **Sign up** link.



The **Sign up** page opens.



The screenshot shows a sign-up form titled "Sign up to Lionbridge Connectors". Below the title is a message: "Please fill out this form, and we'll send you a welcome email shortly. You will only need to complete this verification step once. Thanks for visiting Clay Tablet!". The form contains two text input fields: "Your full name *" and "Your email *". Below these is a reCAPTCHA section with a checkbox labeled "I'm not a robot" and the reCAPTCHA logo. At the bottom, there is a blue "Sign up" button and a "Cancel" link.

3. Enter your name and email address, and select the **I'm not a robot** check box.
4. Click **Sign up**.

The **Sign-up complete** page opens. You will receive a verification email shortly with a verification link that enables you to sign in. If you do not receive an email within a few minutes, please check your junk or spam folder.

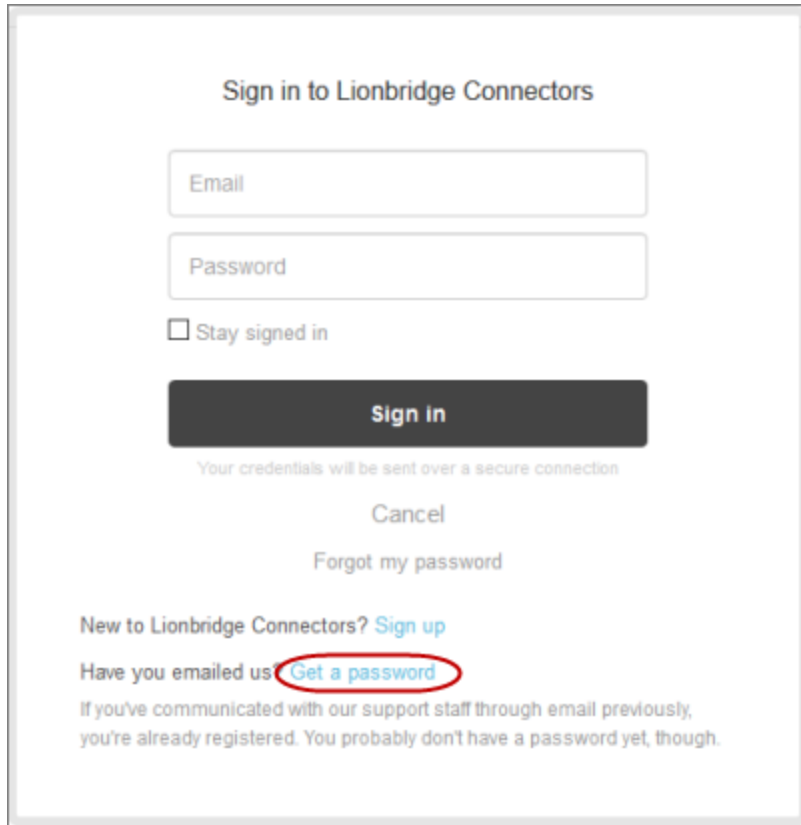
5. Click the link in the verification email to create a password and sign into Zendesk.

1.3.5 Getting a Zendesk Password if You Previously Emailed Lionbridge Connectors

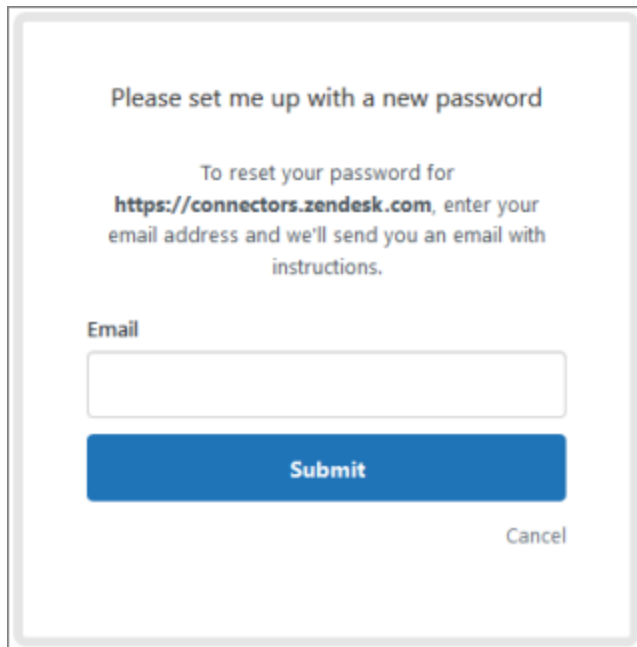
If you have previously emailed Lionbridge Connectors Support at connectors@lionbridge.com to create a support ticket, you can get a password for your email account.

To get a password:

1. Open the Lionbridge Connector Zendesk page in your browser: <https://connectors.zendesk.com>.
2. Click the **Get a password** link.



The **Please set me up with a new password** page opens.



Please set me up with a new password

To reset your password for <https://connectors.zendesk.com>, enter your email address and we'll send you an email with instructions.

Email

Submit

Cancel

3. Enter the email address from which you emailed Lionbridge Connectors Support (connectors@lionbridge.com).
4. Click **Submit**.
Zendesk sends you an email with instructions for creating your password.
5. Follow the instructions in the email from Zendesk to create your password.
You can now sign in to Zendesk to create, view and update your support tickets.

2 System Requirements

Lionbridge for Relativity ("App") supports Relativity® versions 9.3 and higher and RelativityOne.

A Relativity administrator can install the App to any workspace within a Relativity instance.

3 Installing the App

A Relativity administrator must install the App.

To install the App:

1. Select the workspace where you want to install the App.
2. Install the `.RAP` file to that workspace.

Note: Installing the App automatically creates the Lionbridge for Relativity agents. For descriptions of these agents, see "[Lionbridge for Relativity Agents](#)" on page 26.

4 Configuring the App

To configure the App, complete the following tasks:

1. You configure the translation providers to use. For details, see ["Configuring Translation Providers"](#) on page 14.
2. You configure target languages for each translation-provider configuration. For details, see ["Configuring Target Languages"](#) on page 18.
3. You configure source languages for each translation-provider configuration. For details, see ["Configuring Source Languages"](#) on page 21.
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 25.

4.1 Configuring Translation Providers

You configure a translation provider for the App 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 App is installed.
2. In the **Lionbridge Connector** tab, click the **Admin Configuration** child tab.

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

- 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 App delivers content for translation to Lionbridge Freeway.
- **SFTP**: The App delivers content for translation to a secure FTP server.
- **FTP**: The App 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:

■ If SFTP or FTP is selected, the section is displayed as follows:

The screenshot shows a web-based configuration interface titled "Lionbridge Admin Configuration Layout". At the top right, there are four buttons: "Save", "Save and New", "Save and Back", and "Cancel". The main content area is titled "Admin Configuration" and contains the following fields:

- Configuration Type:** A dropdown menu with "SFTP" selected.
- Name:** A text input field.
- Description:** A larger text area for a detailed description.
- User Name:** A text input field.
- New Password:** A text input field.
- Confirm New Password:** A text input field.
- Server Endpoint:** A text input field.
- Port:** A text input field.
- Destination Folder:** A text input field.

5. Enter the following configuration information:

Field	Description
Name	The username of the web service credentials in Lionbridge Freeway, which the Lionbridge Freeway team provides to you. Tip: Freeway refers to the username as the <i>key</i> .
Description	A user-friendly description of this configuration.
Authentication Endpoint	The URL for Freeway Web service authentication. Note: Displayed only if <i>Freeway</i> is the selected configuration type, above.
Service Endpoint	The URL for Freeway Web service requests. Note: Displayed only if <i>Freeway</i> is the selected configuration type, above.
Server Endpoint	The endpoint URL of the SFTP or FTP server. Note: Displayed only if either <i>SFTP</i> or <i>FTP</i> is the selected configuration type, above.
Port	The port for connecting to the FTP or SFTP server. Note: Displayed only if either <i>SFTP</i> or <i>FTP</i> is the selected configuration type, above.

Field	Description
Destination Folder	The root folder of the SFTP or FTP server, where the App delivers content for translation and receives translated content. Note: Displayed only if either <code>SFTP</code> or <code>FTP</code> is the selected configuration type, above.
User Name	User name applies to FTP and SFTP configurations Note: Displayed only if either <code>SFTP</code> or <code>FTP</code> is the selected configuration type, above.
New Password	The password of the web service credentials in Lionbridge Freeway, which the Lionbridge Freeway team provides to you. Tip: Freeway refers to the password as the <i>secret</i> .
Confirm New Password	Re-enter the password from the New Password field, described above.
Submit XML	Background: The App sends a file to Freeway for translation in its native form, for example, as a <code>.docx</code> , <code>.pdf</code> , or <code>.txt</code> file. Select this check box to send the file to Freeway as an <code>.xml</code> file if the native file format is not specified. Note: Displayed only if <code>Freeway</code> is the selected configuration type, above.
Expiration Period in Days	Specify the number of days, after which a submission set will be considered inactive, if no action occurs (it applies for Freeway configuration). Note: Displayed only if <code>Freeway</code> is the selected configuration type, above.

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 App, see ["Changing Permissions for Configuring Translation Providers"](#) on page 17.

4.1.1 Changing Permissions for Configuring Translation Providers

You can change the permissions of who can configure the App 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 App. For detailed instructions, refer to the Relativity documentation: <https://help.relativity.com/9.5/Content/Relativity/Groups.htm>.
2. Navigate to a workspace where the App 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.

For detailed instructions, refer to the Relativity documentation:

https://help.relativity.com/9.5/Content/Relativity/Security_permissions/Setting_workspace_permissions.htm.

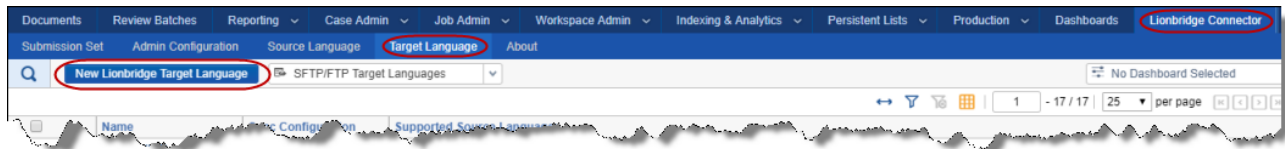
4.2 Configuring Target Languages

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 14.

To configure a target language:

1. In Relativity, click the workspace where the App 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:

Field	Description
Name	The name of this target language. This is the name displayed when users send out content for translation and select a target language.
Sync Configuration	Required. Select the translation-provider configuration for this target language. For details, see "Configuring Translation Providers" on page 14.

5. Click **Save**.

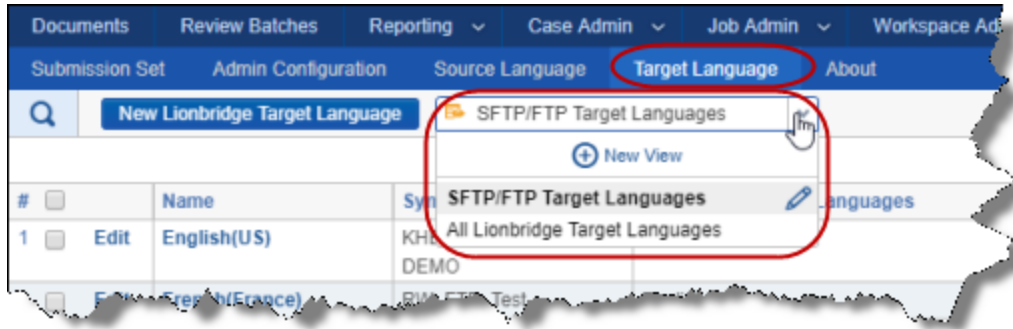
4.2.1 Viewing Configured Target Languages

You can view all configured target languages for the App. 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 App is installed.

- Click the **Lionbridge Connector** tab and then click the **Target Language** child tab.



The tab displays all target languages configured in the App.

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

Field	Description
Name	The name of this target language. This is the name displayed when users send out content for translation and select a target language.
Sync Configuration	Required. The translation-provider configuration for this target language. For a detailed description, see "Configuring Translation Providers" on page 14.
Supported Source Languages	A source language configured for this translation-provider configuration and supported for this target language.

- 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 18.

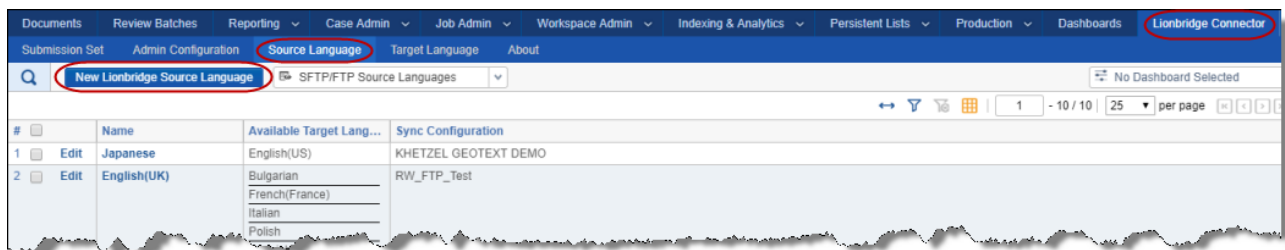
4.3 Configuring Source Languages

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 14.

To configure a source language:

1. In Relativity, click the workspace where the App 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.

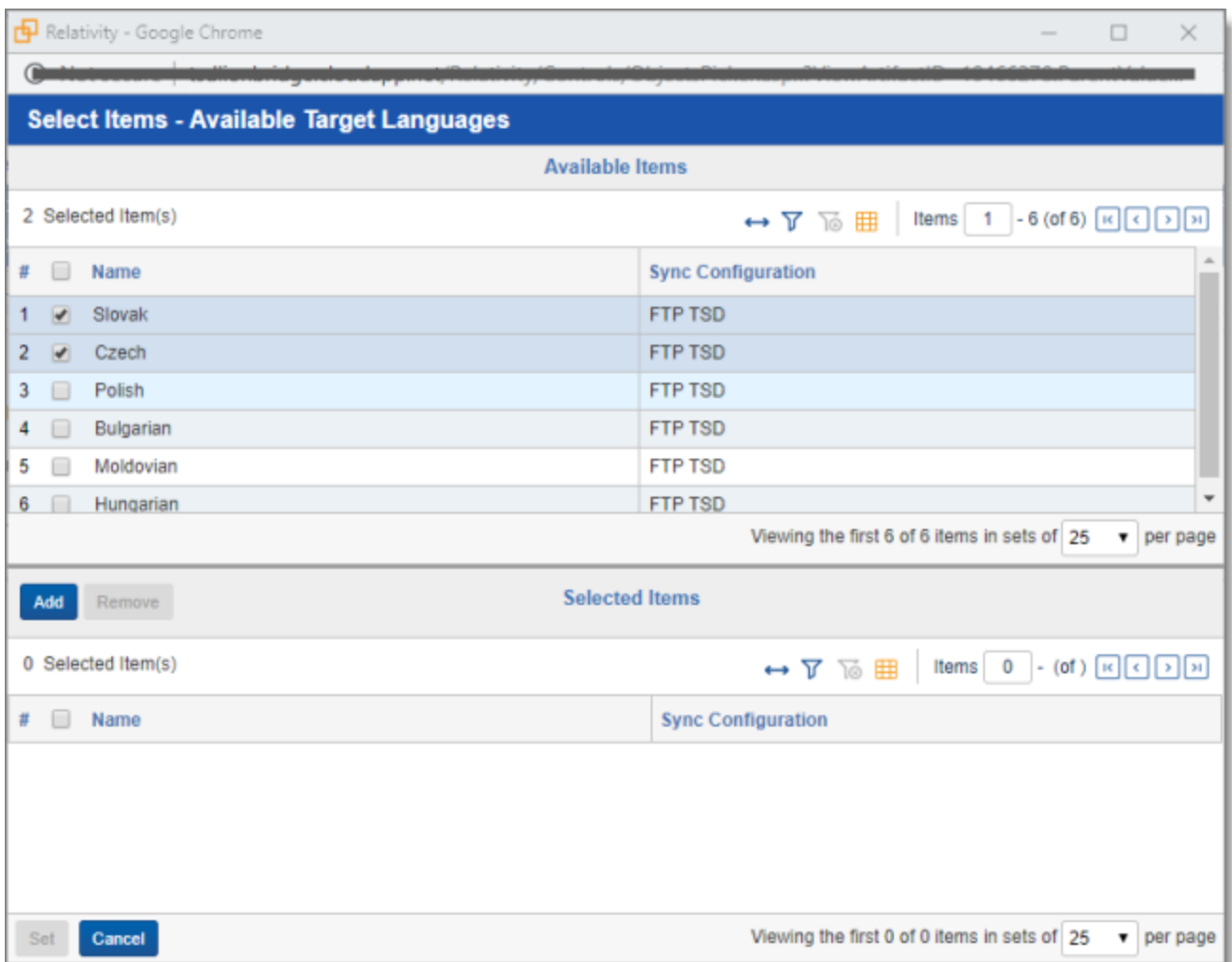
4. Enter the following information in the **Source Language** section:

Field	Description
Name	The name of this source language. This is the name displayed when users send out content for translation and select a source language.

Field	Description
Sync Configuration	Required. Select the translation-provider configuration for this source language. For details, see "Configuring Translation Providers" on page 14.

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 19.

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



Note: The ellipsis button is available only after selecting a **Sync Configuration**, as described in the previous step.

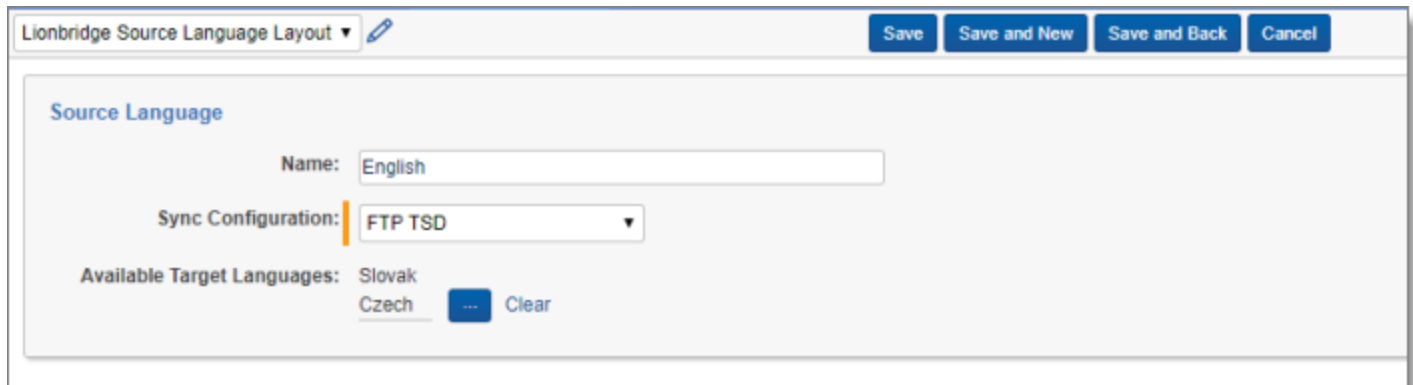
- b. In the top part of the dialog box, select the check boxes for the target languages to configure for this source language, and click **Add**.

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

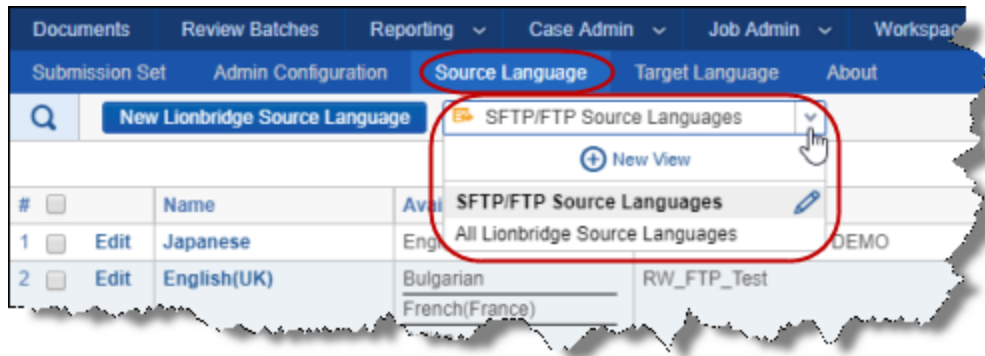
You can view all configured source languages. A *source language* is the original language of documents, from which the documents are translated. Documents are translated from a *source* language into a *target* language.

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 App is installed.

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



The tab displays all source languages configured in the App.

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

Field	Description
Name	The name of this source language. This is the name displayed when users send out content for translation and select a source language.
Available Target Languages	A target language configured for this translation-provider configuration and configured for this source language.
Sync Configuration	Required. The translation-provider configuration for this source language. For a detailed description, see " Configuring Translation Providers " on page 14.

- 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 21.

4.4 Configuring SMTP Settings for Email Notifications

You can configure SMTP settings for the email address that will send out notifications from the App about translation-status events. The App 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 for Relativity User Guide*.

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

The screenshot shows the 'Instance Settings' page in Relativity. The 'smtp' filter is selected, displaying five configuration items:

#	Name	Value	Description	Section	Machine Name
1	SMTPPassword		Defines the password for the username associated with the credentials of the SMTP server.	kCura Notification	
2	SMTPPort		Identifies the port used for SMTP transactions. You can change the default to another port based on the setup of the SMTP server in your environment. It must be an integer value.	kCura Notification	
3	SMTPServer		Identifies the SMTP server used to send notifications. Update the default value with a setting appropriate for your environment.	kCura Notification	
4	SMTPSSLisRequired		Determines if Relativity uses Secure Sockets Layer (SSL) to encrypt the connection to the SMTP server. It is recommended that this value be True.	kCura Notification	
5	SMTPUserName		Defines the username associated with the credentials of the SMTP server. It's validated against the SMTP authentication. The SMTPUserName must be associated with the same account as defined in EmailFrom.	kCura Notification	

You must configure the following settings:

- Authentication Email From
- SMTP Password
- SMTP Port
- SMTP Server
- SMTP User Name

5 Lionbridge for Relativity Agents

The App includes eight agents, which are automatically created the first time that the App 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 App includes the following agents:

Agent	Description
Lionbridge Freeway Objects Sync Agent	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).
Lionbridge Set Scheduler Agent	This agent queues scheduled submission sets for submission to the FTP or SFTP server or to Lionbridge Freeway.
Lionbridge Project Submit Agent	This agent submits queued submission sets to Lionbridge Freeway for translation.
Lionbridge Status Update Agent	This agent updates the status of submitted submission sets based on the statuses returned by the Freeway platform.
Lionbridge Consistency Check Agent	This agent checks the consistency of submission sets.
Lionbridge Freeway File Delivery Agent	This agent checks for translated submission sets from Lionbridge Freeway and delivers them to Relativity.
Lionbridge FTP Translation Download Agent	This agent checks for translated documents on the FTP/SFTP server and downloads them to Relativity.
Lionbridge FTP Folder Deletion Queue Agent	This agent checks for deleted submission sets and deletes their related folders on the FTP or SFTP server.

6 Uninstalling the App

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

https://help.relativity.com/9.5/Content/Relativity/Applications/Uninstalling_and_deleting_applications.htm.