Use a Translation Management workflow

The Translation Management workflow creates and routes copies of a source document in a Translation Management library to designated translators for translation. The Translation Management workflow is available only for Translation Management libraries.

In this article

How does a Translation Management workflow work?

The Translation Management workflow is designed to help organizations manage the manual translation of documents by managing and tracking the assignment of translation tasks. This workflow is available only for Translation Management libraries. For more information about Translation Management libraries, see Create a Translation Management Library.

The Translation Management workflow works with a Translators List, which lists the person responsible for translating documents into a specific language. The workflow can be configured to start manually or automatically for a source document.

When the Translation Management workflow starts on a source document, it creates a copy of the source document for every translator specified in the Translators List for the source document's language. The workflow also sets the appropriate language property for each placeholder document and creating a relationship between the placeholder and the source document. The workflow then assigns a translation task to each of the translators. The workflow participants receive e-mail alerts about their workflow tasks.

After a translator completes a translation task, he or she marks it as complete. When all translation tasks in a workflow are completed, the workflow is marked as Complete.

The workflow can be configured so that it ends automatically and cancels all uncompleted translation tasks if the source document changes while the workflow is in progress.

Top of Page

Add a Translation Management workflow to a Translation Management library

You can add a Translation Management workflow to a Translation Management library at the time you create the library. Alternatively, you can add a Translation Management workflow to an existing Translation Management library at any time.

Create a new Translation Management library with a Translation Management workflow

You can create a Translation Management Library and add a Translation Management workflow to that library at the same time. You must have the Manage Lists permission to create a Translation Management Library for a site.

Create a Translation Management Library

1. On the Quick Launch, click **View All Site Content**, and then click **Create**.
2. Under **Libraries**, click **Translation Management Library**.
3. In the **Name** box, type a name for the library. The library name is required.

   The name appears at the top of the library page, becomes part of the address for the library page, and appears in navigational elements that help users to find and open the library.

4. In the **Description** box, type a description of the purpose of the library. The description is optional.

   The description appears at the top of the library page, underneath the name of the library. If you plan to enable the library to receive content by e-mail, you can add the e-mail address of the library to its description, so that people can easily find it.

5. To add a link to this library on the Quick Launch, verify that **Yes** is selected in the **Navigation** section.

6. To create a version each time a file is checked into the library, in the **Document Version History**, click **Yes**.

   You can later choose whether you want to store both major and minor versions and how many versions of each you want to track.

7. In the **Document Template** section, in the list, click the type of default file that you want to be used as a template for files that are created in the library.
8. In the **Translation Management Workflow** section, click **Yes** to add a Translation Management workflow to the library.
9. Click **Next** to configure the Translation Management workflow.

Configure the Translation Management workflow

1. On the **Add a Workflow** page, in the **Name** section, type a unique name for this workflow if you want to change it from the default value **Translation Management**.
2. In the **Task List** section, specify a task list to use with this workflow.

   Notes

   - You can use the default Tasks list or you can create a new one. If you use the default Tasks list, workflow participants will be able to find and view their workflow tasks easily by using the **My Tasks** view of the Tasks list.
   - Create a new Tasks list if the tasks for this workflow will involve or reveal sensitive or confidential data that you want to keep separate from the general Tasks list.
   - Create a new Tasks list if your organization will have numerous workflows or if workflows will involve numerous tasks. In this instance, you might want to create Tasks lists for each workflow.

3. In the **History List** section, select a history list to use with this workflow. The history list displays all of the events that occur during each instance of the workflow.

   Note You can use the default **History** list or you can create a new one. If your organization will have numerous workflows, you might want to create a separate History list for each workflow.

4. In the **Start Options** section, specify how, when, or by whom a workflow can be started.

   Notes

   - Specific options may not be available if they are not supported by the workflow template you selected.
   - The option **Start this workflow to approve publishing a major version of an item** is

available only if support for major and minor versioning has been enabled for the library and if the workflow template you selected can be used for content approval.

5. Click **Next**.
6. In the **Lists of Languages and Translators** section, do one of the following:
   - To specify that the workflow use an existing list of translators to assign translation tasks, click **Use an existing list of languages and translators from the site**, and then select the list you want to use.

     Note This option is available only if a Translators list already exists for your site.

   - To create a new list of languages and translators to use for instances of the workflow, click **Create a new list of languages and translators for this workflow**, type a unique name for list in the **List name** box, and then select the **Open the new translators list in a separate window** check box if you want to begin adding names to the new translators list when you finish customizing the workflow.
7. In the **Due Date** section, specify the range of days within which workflow tasks should be completed for workflows that start automatically.

   Note The option to set a due date is available only if you chose to have the workflow start automatically when documents are either created or changed in the library.

8. In the **Complete the Workflow** section, select the **When the source document is changed** check box if you want the workflow to be completed whenever all tasks are completed or someone changes the source document for the translation.

   If you do not select this check box, the workflow will be completed when all translation tasks are completed.

9. Click **OK**.
10. If you chose to create a new list of translators for use with this workflow and to have that list open in a new window, a separate window opens, and you can begin adding names to the list.

Top of Page

Add a Translation Management workflow to an existing Translation Management library

You can add a Translation Management workflow to an existing Translation Management Library at any time. You might want to add multiple Translation Management workflows to one library if you want to have separate Translators lists for different source documents in the same library, or different translation rules for different source documents.

1. Open the Translation Management library to which you want to add a new Translation Management workflow.
2. On the **Settings** menu 

, click the settings for the type of library that you are opening.

   For example, in a document library, click **Document Library Settings**.

3. Under **Permissions and Management**, click **Workflow settings**.

   Note If workflows have already been added to this list, library, or content type, this step will take you directly to the Change Workflow Settings page, and you need to click **Add a workflow** to go to the Add a Workflow page. If no workflows have been added to this list, library, or content type, this step will take you directly to the Add a Workflow page.

4. In the **Name** section, type a unique name for this workflow if you want to change it from the default value **Translation Management**.
5. In the **Task List** section, specify a task list to use with this workflow.

   Notes

   - You can use the default Tasks list or you can create a new one. If you use the default Tasks list, workflow participants will be able to find and view their workflow tasks easily by using the **My Tasks** view of the Tasks list.
   - Create a new Tasks list if the tasks for this workflow will involve or reveal sensitive or confidential data that you want to keep separate from the general Tasks list.
   - Create a new Tasks list if your organization will have numerous workflows or if workflows will involve numerous tasks. In this instance, you might want to create Tasks lists for each workflow.

6. In the **History List** section, select a history list to use with this workflow. The history list displays all of the events that occur during each instance of the workflow.

   Note You can use the default **History** list or you can create a new one. If your organization will have numerous workflows, you might want to create a separate History list for each workflow.

7. In the **Start Options** section, specify how, when, or by whom a workflow can be started.

   Notes

   - Specific options may not be available if they are not supported by the workflow template

you selected.
   - The option **Start this workflow to approve publishing a major version of an item** is available only if support for major and minor versioning has been enabled for the library and if the workflow template you selected can be used for content approval.

8. Click **Next**.
9. In the **Lists of Languages and Translators** section, do one of the following:
   - To specify that the workflow use an existing list of translators to assign translation tasks, click **Use an existing list of languages and translators from the site**, and then select the list you want to use.
   - To create a new list of languages and translators to use for instances of the workflow, click **Create a new list of languages and translators for this workflow**, type a unique name for list in the **List name** box, and then select the **Open the new translators list in a separate window** check box if you want to begin adding names to the new translators list when you finish customizing the workflow.
10. In the **Due Date** section, specify the range of days within which workflow tasks should be completed for workflows that start automatically.

    Note The option to set a due data is available only if you chose to have the workflow start automatically when documents are either created or changed in the library.

11. In the **Complete the Workflow** section, select the **When the source document is changed** check box if you want the workflow to be completed whenever all tasks are completed or someone changes the source document for the translation.

    If you do not select this check box, the workflow will be completed when all translation tasks are completed.

12. Click **OK**.
13. If you chose to create a new list of translators for use with this workflow and to have that list open in a new window, a separate window opens, and you can begin adding names to the list.

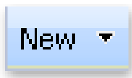
Top of Page

Customize a Translators list for use with a Translation Management workflow

When you start a translation workflow, the workflow creates a copy of the source document for each of the target languages specified in the translators list for the workflow. It then assigns the translation tasks to the translators specified for these languages in the translators list. If there is more than one translator specified for a specific type of translation (for example, for a translation from English to Spanish), then each of these translators will receive a translation task.

1. If it is not already open, open the translators list for your workflow.

   If the name of your list does not appear, click **View All Site Content**, and then click the name of your list.

2. On the **New** menu 

, click **New Item**.
3. In the **Translating From** section, select the original language of the source document from which this translator will translate documents from the list, or click **Specify your own value**, and type the language in the box.
4. In the **Translating To** section, select the language into which this translator will translate documents from the list, or click **Specify your own value**, and type the language in the box.
5. In the **Translator** section, type the name of the translator who will perform this type of translation, or click the **Browse** button to select a name from the directory service.
6. Click **OK**.
7. Repeat steps 2 through 6 to add additional translators to the list.

Top of Page

Start a Translation Management Workflow

If a Translation Workflow has been configured to be started manually, you can start the workflow manually on documents in a Translation Management Workflow. You must have at least the Edit Items permission to start a workflow. Some workflows may require that you also have the Manage Lists permission in order to start a workflow on a document.

Note If you want to ensure that workflow participants receive e-mail notifications and reminders about their workflow tasks after you start a workflow, check with your server administrator to verify that e-mail notifications have been enabled for your site.

1. Open the Translation Management library that contains the document on which you want to start a workflow.
2. Point to the document for which you want to start a workflow, click the arrow that appears, and then click **Workflows**.
3. Under **Start a New Workflow**, click the name of the workflow that you want to start.
4. Under **Request Translation**, type or select the date by which you would like translations to be completed in the **Due Date** box.
5. Type the message that you want to include with your translation request.
6. Click **Send**.

The workflow starts immediately. It creates a copy of the source document in each of the target languages specified in the translators list for the workflow. It also creates translation tasks for each of the translators in the translators list. The tasks request that the source document be translated into the specified language. If there is more than one translator specified for a specific type of translation (for example, for a translation from English to Spanish), then each of these translators will receive a translation task. If e-mail has been enabled for the site, the workflow participants will also receive an e-mail notification of their translation tasks.

Top of Page

Complete a Translation Management workflow task

To fully complete a Translation Management workflow, you must do two things:

- Save the translated copy of the source document to the Translation Management library.
- Edit the workflow task to indicate that its status is **Completed**.

Because it may take some time to translate a document, you may want to edit the workflow task form to communicate your progress on the translation task before you actually complete the task.

1. Open the **Tasks** list for the site, and then select **My Tasks** on the **View** menu to locate your workflow task.

   Note If the workflow does not use the default Tasks list, your workflow task may not appear in the Tasks list. To locate your workflow task, go to the list or library where the workflow item is saved. Point to the item that you want, click the arrow that appears, and then click **Workflows**. On the **Workflow Status** page, under **Running Workflows**, click the name of the workflow in which you are a participant. Under **Tasks**, locate your workflow task.

2. Point to the name of the task you want to complete, click the arrow that appears, and then click **Edit Item**.
3. Click the link to the document that needs to be translated, and then click **Open**.
4. It is a good idea to check the document out while you are translating it. Click the **Microsoft Office Button**, point to **Server Tasks**, and then click **Check Out**.
5. Translate the document.
6. When you have finished translating the document, click the **Microsoft Office Button**, and then click **Save**.
7. Click the **Microsoft Office Button**, point to **Server Tasks**, and then click **Check In**.
8. In the workflow task form, next to **Change the translation status to** select the status value that you want. For example, select **In Progress** or **Completed**.
9. Click **OK**.

Top of Page