

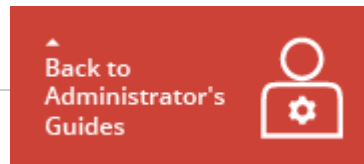
# Configuring Smart Connector

## License Agreement

This article presents the features available in the Ultimate plan of XTRF Translation Management System. Please keep in mind that your access to the described options might be limited due to your license agreement. If you would like to change your plan of XTRF Translation Management System and gain access to the additional features, contact your [XTRF Customer Success Manager](#).

Target audience: Administrators

- [I. Find Smart Connectors](#)
- [II. Set up Smart Connector](#)
  - [Set Up a Basic Smart Connector](#)
  - [Set Up an Advanced Smart Connector](#)



Smart Connectors are powerful tools that allow creating predefined

projects as soon as a file is uploaded to the folder or send in a message to the e-mail address specified in the Smart Connector configuration. They work similarly to the periodic jobs and are designed to save Project Manager's time when your client orders multiple translation projects of the same type. This article presents you how to create and configure a Smart Connector. Depending on your knowledge of JavaScript you can either configure the basic Smart Connector, which does not require any knowledge of the JavaScript, or you can prepare an advanced Smart Connector, which requires at least basic knowledge of Java Script. The information how to prepare set up both types of the Smart Connectors is provided below. Mind, that steps in both section I and section II need to be performed to set up a Smart Connector, however in section II you can choose whether you want to set up a basic or advanced Smart Connector.

## Prepare Folders for Smart Connectors

Before following the steps in this guide, make sure that the folder in a files sharing service or an e-mail address is already prepared, therefore it can be mapped for the Smart Connector to scan.

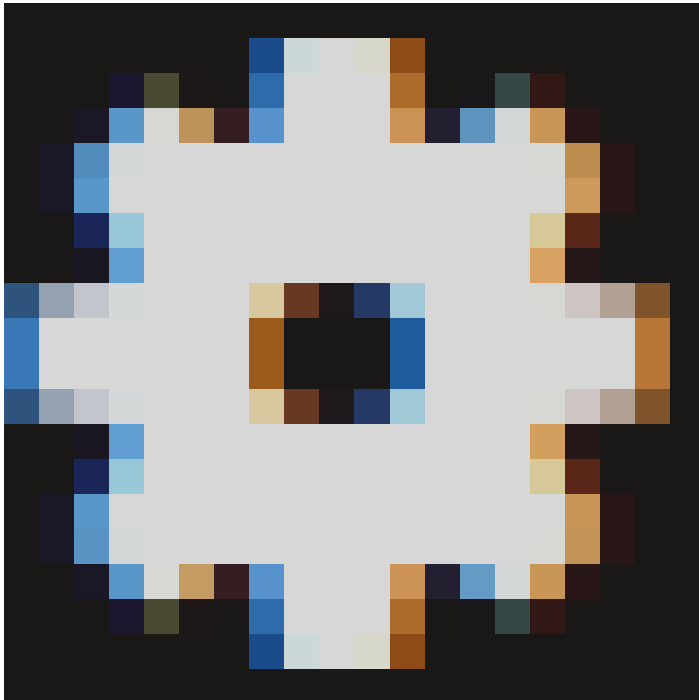
## Before Reading a Guide

- The steps without any marking are mandatory to perform because they ensure carrying on a proper function of the Home Portal.
- The steps marked with the (Optional) label give you information about settings useful for you in terms of fulfilling specific requirements for your projects, but if you skip them it will have no negative effect on the function of the Home Portal.

## I. Find Smart Connectors

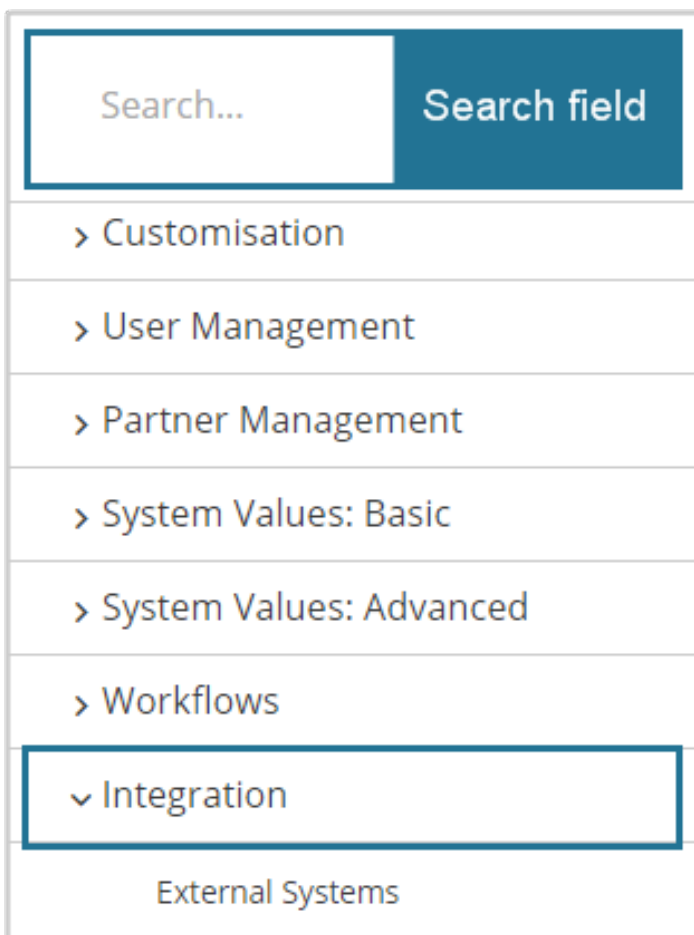
1 Sing in to the Home Portal of XTRF Platform.

2 Click the



icon.

3 In the configuration accordion menu click the Integration and then select the Smart Connectors.



Periodic Jobs
QuickBooks
QuickBooks Online
<b>Smart Connectors [BETA]</b>
SMS Broker
Web Service API
XTRF Macros
> Templates
> System Information

4 Click the Add button at the top of the Smart Connectors list or Add Smart Connector button in the upper right corner. You are directed to the Add Smart Connector page.

**- Add Smart Connector**

General Settings | Schedule | E-mail Notifications | Logs

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Name:

Active:

Client:

Client Price Profile:

Files Aggregation:

Scan for Input Files:  XTRF directory  FTP  SFTP  E-mail

Directory:

After Successfully Processing, Store Files in:  XTRF directory  On FTP  On SFTP  Do not store

In Case of Errors, Store Files in:  XTRF directory  On FTP  On SFTP  Do not store

Person Responsible:  Use PM Responsible  Select User:

Connector Definition:  Wizard  Robot Code

Source Language:

Target Language:

Service:

Specialization:

## II. Set up Smart Connector

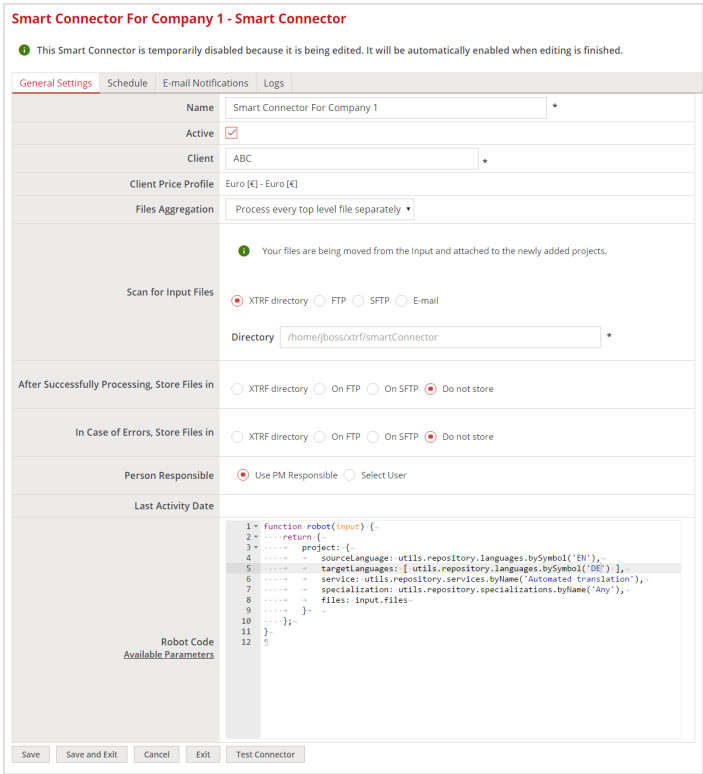
At this point you can decide what kind of Smart Connector you want to set up. The type of Smart Connector depends on your needs and your JavaScript proficiency. If you have no basic knowledge of JavaScript, you can easily set up basic Smart Connector.

### Set Up a Basic Smart Connector

In case of basic Smart Connector any knowledge of JavaScript is not required. You can use drop-down menus available in the configuration wizard to easily and quickly set up the Smart Connector. To set up a basic Smart Connector, perform the following steps:

You are unable to save the Smart Connector or switch to other tabs unless the information is provided to the fields marked with the asterisk.

1.	In the Name field provide the name of the Smart Connector.  <div style="border: 1px solid #f0e68c; padding: 5px;">Smart Connector Name != Project Name The information provided in this field does not apply to the project created by the Smart Connector. Project name can be specified in the Robot Code.</div>
2.	Select the Active checkbox. If it is not selected, the Smart Connector is disabled and does not attempt to create projects.
3.	In the Client field start typing the name of the client to whom the Smart Connector is dedicated. The system will provide suggestions as you start typing.  <div style="border: 1px solid #f0e68c; padding: 5px;">The Smart Connector selects the default Contact Person specified in the client's Price List. If there is no default Contact Person, the first Contact Person from the client's Price List is selected.</div>
4.	(Optional) Select the Client's Price Profile.  <div style="border: 1px solid #c8e6c9; padding: 5px;">Default Price Profile If there is only one Price Profile for the selected client, it is selected automatically.</div>
5.	From the Files Aggregation drop-down menu select how the Smart Connector will handle the source files. The Smart Connector can: <ul style="list-style-type: none"><li>• Process every file separately: For every file uploaded to the mapped folder, the Smart Connector creates separate folder,</li><li>• Process files in batches: The Smart Connector will create one project for all the files.</li></ul>
6.	Provide the directory of a folder that the Smart Connector will scan for files. It can be either located on your local machine, on the FTP or SFTP server or it can be an e-mail address. Provide the necessary information in the available fields.
7.	Provide the directory for the processed files . You can select the directory on your local machine, an FTP server or an SFTP server or you can select the Do not store option, if you do not want to store processed files.
8.	Provide the directory where files will be stored, if any errors occur. You can select the directory on your local machine, an FTP server or SFTP server, or you can select the Do not store option, if you do not want to store files in case of errors.

9.	Select the person that will be responsible for the Smart Connector. You can select the Project Manager or select a user from the drop-down menu.
10	In the Connector Definition section select the Wizard radio button.
11	<p>Select the specifications of the project from the drop-down menus. You can specify:</p> <ul style="list-style-type: none"> <li>• Source language,</li> <li>• Target language,</li> <li>• The kind of service,</li> <li>• Specialization.</li> </ul> <p>If you do not select any option in the menus, the default values are applied.</p>
12	<p>You can now configure settings in other tabs.</p> <ul style="list-style-type: none"> <li>• To select when the Smart Connector attempts to create a project go to the Schedule tab and select the desired options.</li> <li>• To configure when and to whom the notifications are sent go to the E-mail Notification tab and select appropriate checkboxes.</li> </ul>
13	<p>Click the Save button. Below you can see an example of a Smart Connector set up in the configuration wizard.</p> 

## Set Up an Advanced Smart Connector

In advanced Smart Connector you can add more parameters to the project, however this requires at least basic knowledge of JavaScript. To do so, follow the steps:

You are unable to save the Smart Connector or switch to other tabs unless the information is provided to the fields marked with the asterisk.

1.	<p>In the Name field provide the name of the Smart Connector.</p> <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Smart Connector Name != Project Name  The information provided in this field does not apply to the project created by the Smart Connector. Project name can be specified in the Robot Code.</p> </div>
2.	<p>Select the Active checkbox. If it is not selected, the Smart Connector is disabled and does not attempt to create projects.</p>
3.	<p>In the Client field start typing the name of the client to whom the Smart Connector is dedicated. The system will provide suggestions as you start typing.</p> <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>The Smart Connector selects the default Contact Person specified in the client's Price List. If there is no default Contact Person, the first Contact Person from the client's Price List is selected.</p> </div>
4.	<p>(Optional) Select the Client's Price Profile.</p> <div style="border: 1px solid green; padding: 5px; margin: 10px 0;"> <p>Default Price Profile  If there is only one Price Profile for the selected client, it is selected automatically.</p> </div>
5.	<p>From the Files Aggregation drop-down menu select how the Smart Connector will handle the source files. The Smart Connector can:</p> <ul style="list-style-type: none"> <li>• Process every file separately: For every file uploaded to the mapped folder, the Smart Connector creates separate folder,</li> <li>• Process files in batches: The Smart Connector will create one project for all the files.</li> </ul>
6.	<p>Provide the directory of a folder that the Smart Connector will scan for files. It can be either located on your local machine, on the FTP or SFTP server or it can be an e-mail address. Provide the necessary information in the available fields.</p>
7.	<p>Provide the directory for the processed files . You can select the directory on your local machine, an FTP server or an SFTP server or you can select the Do not store option, if you do not want to store processed files.</p>
8.	<p>Provide the directory where files will be stored, if any errors occur. You can select the directory on your local machine, an FTP server or SFTP server, or you can select the Do not store option, if you do not want to store files in case of errors.</p>
9.	<p>Select the person that will be responsible for the Smart Connector. You can select the Project Manager or select a user from the drop-down menu.</p>
10	<p>In the Connector Definition section select the Robot Code radio button. You can see the default settings in the Connector Definition code filed.</p>
11	<p>Change the settings according to your needs. You can find the list of available parameters in the <a href="#">Smart Connectors - Technical Guide</a>, section Available Parameters.</p>
12	<p>You can now configure settings in other tabs.</p> <ul style="list-style-type: none"> <li>• To select when the Smart Connector attempts to create a project go to the Schedule tab and select the desired options.</li> <li>• To configure when and to whom the notifications are sent go to the E-mail Notification tab and select appropriate checkboxes.</li> </ul>

13 Click the Save button. Below you can see an example of an advanced Smart Connector.

```
1 function robot(context) {
2     return {
3         project: {
4             name: "Translation Project - ABC",
5             sourceLanguage: repository.languages.bySymbol('EN-US'),
6             targetLanguages: [ repository.languages.bySymbol('DE'), repository.languages.bySymbol('FR-CA) ],
7             service: repository.services.byName('Translation & Proofreading'),
8             specialization: null, repository.specializations.byName('any'),
9             categories: [ repository.categories.byName('commercial-project') ],
10            notes: "Important notes",
11            instructionsFromCustomer: "Important instructions from client",
12            internalInstructions: "Important internal instructions",
13            startDate: new Date(2017, 0, 1),
14            deadline: new Date(new Date().getFullYear()+1, 0, 31),
15            files: { inputFiles: null, outputFiles: null },
16            delivery: {
17                uri: "file://localhost/SmartConnector/output",
18                type: "file",
19                format: "zip",
20                size: 1000000000
21            }
22        }
23    };
24 }
```

The advanced parameters added in the robot code in the example are as follows:

- **name:** the parameter specifies the name of the project,
- **sourceLanguage:** this parameter specifies the source language
- **targetLanguages:** in this parameter two target languages are specified,
- **service:** this parameter specifies the type of workflow in the project,
- **specialization:** this parameter specifies the specialization of the translation project,
- **categories:** the category of translation is specified by this parameter,
- **notes:** the message "Important notes" is added to the Notes section in the Instructions tab of the project will be displayed.
- **instructionsFromCustomer:** the message "Important instructions from client" will be displayed in the Special Instructions from Client section of the Instructions tab of the project.
- **internalInstructions:** the message "Important internal instructions" will be displayed in the Internal Special Instructions section of the Instructions tab of the project.
- **startDate:** the start date of the project is specified by this parameter,
- **deadline:** the deadline of the project is specified in this parameter
- **delivery:** the directory where the translated files will be uploaded when the project is finished is specified in this parameter.

Please refer also to the related articles:

- **Basic Definition :**
  - [Smart Connectors Definition](#)
- **XTRF Modules Context-Sensitive Help:**
  - [Browse Smart Connectors - Integration](#)
  - [Smart Connectors - Integration](#)
  - [General Settings - Smart Connectors - Integration](#)
  - [Schedule - Smart Connectors - Integration](#)
  - [Notifications - Smart Connectors - Integration](#)
  - [Logs - Smart Connectors - Integration](#)
- **Technical Article:**
  - [Smart Connectors - Technical Guide](#)

Unknown macro: 'show-if'