

SDL Translation Management System

User Guide

SDL* Translation Management System

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INTRODUCING SDL TMS

This chapter introduces the SDL TMS User Guide, provides an overview of SDL TMS, the procedure for logging in and out and TMS key concepts. Sections include:

- About this Guide
- Introducing SDL TMS
- Log in and log out
- SDL TMS Key Concepts
- Working with your SDL TMS Inbox

Chapter

ABOUT THIS GUIDE

Welcome to the SDL Translation Management System (SDL TMS) User Guide. This guide provides an overview of SDL TMS functionality and describes how to access and use the functions. The procedures for installing, setting up and maintaining SDL TMS are described in the SDL TMS Administrator Guide.

Audience

This guide is intended for use by all levels of user; from project managers to translators, reviewers and proofreaders.

INTRODUCING SDL TMS

SDL TMS is a Global Information Management System (GIMS). It manages the process of translating original language files into one or more target languages and delivers the finished translations to the required location. In addition to managing the translation process, SDL TMS also performs some of the work involved. For example, SDL TMS automatically prepares source language files for translation and applies translation memories to them.

There are two ways to submit new translation requests to SDL TMS:

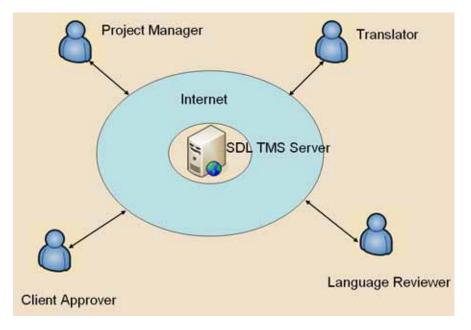
- Users can create new requests in SDL TMS.
- □ SDL TMS can be set up to monitor web folders and other file systems and automatically create a new translation request when files are added or updated.

Users can download completed translations from SDL TMS. Also, you can set up SDL TMS to put translated files in a file system or web folder.

System Overview

SDL TMS is accessed via the Internet; there is no SDL TMS software installed on your PC. You connect to SDL TMS using your web browser and, once you have logged on, you can work with the application as if it was installed on your PC or local network.

You can use Microsoft Internet Explorer, Mozilla Firefox or Google Chrome to access SDL TMS. You can work online in SDL TMS or you can download files and work on them locally (offline).



Legacy Filters (ITD files)

The following table describes the file types you can add to SDL TMS projects and the preparatory steps needed (if any). It also lists the SDL TMS filter type associated with each file type and the type of associated (supporting) files needed for processing (if any). It may be possible to submit other file types to SDL TMS if your system has been set up specially to handle them.

File Type	Extension	Preparatory Steps	Filter Type	Associated File
Deprecated - Adobe FrameMaker	FM MIF	Save FM files as MIF files directly in FrameMaker	MIF	None
		Note: If you want SDL TMS to extract indexes, variables and cross-references for translation, you must use a workflow containing the Adobe FrameMaker - Extract Common Content and Adobe FrameMaker - Insert Common Content steps. See <i>FrameMaker Book</i> <i>Processing in SDL</i> <i>TMS</i> on page 6-4		
Deprecated - Adobe Freehand	Graphics formats	Cut and paste text into a TXT or RTF document	RTF TXT	None
Deprecated - Adobe InDesign	Deprecated - INX	None	InDesign C52 INX	None
Deprecated - Adobe Illustrator	Graphics formats	Cut and paste text into a TXT or RTF document	RTF TXT	None
Deprecated - Adobe PageMaker	P65, PMD	Use PageMaker filter to convert to ITD format	ITD	None

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File Type	Extension	Preparatory Steps	Filter Type	Associated File
Deprecated - Generic Delimited	TXT, CSV, REZ	None	Generic Delimited	Options XML File
Deprecated - Interleaf	IASCII	Use filter to convert to ITD format	ITD	None
Deprecated - Java Properties files	Properties	None	Java Properties	None
Deprecated - Mac OS X Resource files	NIB, RSRC, strings	Extract text using a Mac resource editor such as Appleglot or Powerglot and save as a TXT document Note: This may cause encoding problems during reintegration	ITD	None
Microsoft Excel 2000-2003	XLS, XLT	None	Excel 2000- 2003	Options XML File
Deprecated - Microsoft Excel SDL TMS	XLSX	None	Excel 2007	None
Deprecated - Microsoft PowerPoint 2000-2003	PPT, PPS, POT	None	PowerPoint 2000–2003	None
Deprecated - Microsoft PowerPoint 2007	РРТХ	None	PowerPoint 2007	None
Deprecated - Microsoft Word 2000-2003	DOC	None	Word 2000–2003	None
Deprecated - Microsoft Word 2007	DOCX	None	Word 2007	None

File Type	Extension	Preparatory Steps	Filter Type	Associated File
Deprecated - Markup Languages	HTML, SGML, XML	None	HTML XML	Analysis (ANL) File
Deprecated - OpenOffice	ODT, ODS, ODP	None	XML	Options XML File
Passolo Translation Bundle	TBU TBULIC700 TBULIC800 TBULIC11 TBULIC15 TBULIC16	None	Passolo Translation Bundle	None
Deprecated - PDF	PDF	Convert files to RTF format Note: Formatting and even content will typically be lost	RTF	None
Deprecated - QuarkXPress	QXD, QXT, QSC, XTG	Use SDLXtract to create XTG files	XPress Tags	Options XML File
Deprecated - SDLX Translation Documents	ITD	None	ITD	None
Deprecated - StarOffice	SXW, SXC, SXI	None	XML	Options XML File
Deprecated - Tridion ITS	cat, cmp, fol, key, pag, str	None	SDL Tridion ITS	none
Deprecated - Web based files	XSL, PHP, INC, ASP, ASPX, JSP	None	HTML	Analysis (ANL) File
Deprecated - Windows Binary files	EXE, DLL, OCX, LNG	Use SDL Passolo to prepare files manually	ITD	None
Deprecated - Windows online Help files	CHM, HLP	Use source RTF and HTML files	RTF	None

File Type	Extension	Preparatory Steps	Filter Type	Associated File
Deprecated - Windows Resource files	RC, DLG	None	Generic Delimited RC	Options XML File
Windows RTF files	RTF	None	RTF	None

Studio filters (SDL XLIFF files)

The following table describes the Studio file types (SDL XLIFF) you can add to SDL TMS projects and the preparatory steps needed (if any). It also lists the SDL TMS filter type associated with each file type and the type of associated (supporting) files needed for processing (if any). It may be possible to submit other file types to SDL TMS if your system has been set up specially to handle them

File Type	Extension	Preparatory Steps	Filter Type	Associated File
Adobe FrameMaker 8-13	MIF	None	Adobe FrameMaker 8-12	Options XML File
Adobe InCopy CS4-CC	ICML	None	Adobe InCopy CS4-CC	Options XML File
Adobe InDesign CS2-CS4	INX	None	Adobe InDesign CS2-CS4	Options XML File
Adobe InDesign CS4-CC	IDML	None	Adobe InDesign CS4-CC	Options XML File
Any XML	XML	None	Any Xml	Options XML File
Deprecated - Comma Delimited Text (Studio 2011)	CSV	None	Comma Delimited Text (Studio 2011)	Options XML File
Comma Delimited Text	CSV	None	Comma Delimited Text	Option XML File
Deprecated - HTML (Studio 2011)	ASCX, ASP, ASPX, HHC, HHK, HTM, HTML, INC, JSP, PHP	None	HTML (Studio 2011)	Options XML File
HTML 4	ASCX, ASP, ASPX, HHC, HHK, HTM, HTML, INC, JSP, PHP, XHTML	None	HTML 4	Option XML File

File Type	Extension	Preparatory Steps	Filter Type	Associated File	
HTML 5	ASCX, ASP, ASPX, HHC, HHK, HTM, HTML, INC, JSP, PHP, XHTML	None	HTML 5	Option XML File	
Java Resources	Properties	None	Java Resources	Options XML File	
JSON	json	None	JSON	Options XML	
Microsoft .NET Resources	RESX	None	Microsoft .NET Resources	Options XML File	
Microsoft Excel 2000-2003	XLS, XLT	LS, XLT None Microsoft Exc 2000-2003		Options XML File	
Microsoft Excel 2007-2013	XLSM, XLSX, XLTX	None	Microsoft Excel 2007-2016	Options XML File	
Microsoft Excel 2007-2016	XLSM, XLSX, XLTM, XLTX	None	Microsoft Excel 2007-2016	Options XML File	
Microsoft PowerPoint 2007-2013	POTM, POTX, PPSM, PPSX, PPTM, PPTX	None	Microsoft PowerPoint 2007-2016	Options XML File	
Microsoft PowerPoint XP- 2003	Microsoft POT, PPS, PPT PowerPoint XP-		Microsoft PowerPoint XP- 2003	Options XML File	
Microsoft Word 2000-2003	DOC, DOT	None	Microsoft Word 2000-2003	Options XML File	
Microsoft Word 2007-2013	DOCM, DOCX, DOTM, DOTX			Options XML File	
Microsoft Word 2007-2016	DOCM, DOCX, DOTM, DOTX	None	Microsoft Word 2007-2016	Options XML File	
OASIS DITA 1.2 Compliant	DITA, XML	None	OASIS DITA 1.2 Compliant	Options XML File	

File Type	Extension	Preparatory Steps	Filter Type	Associated File	
OASIS DocBook 4.5 Compliant	XML	KML None OA 4-5		Options XML File	
Deprecated - OASIS XLIFF 1.2 Compliant (Studio 2011)	XLF, XLIFF	None OASIS XLIFF Compliant (Studio 2011)		Options XML File	
OASIS XLIFF 1.2 Compliant	XLF, XLIFF	None	OASIS XLIFF 1.2 Compliant	Option XML File	
OASIS XLIFF 2.0 Compliant (Studio) - BETA	Compliant		OASIS XLIFF 2.0 Compliant - BETA	Option XML File	
OpenDocument Presentation	ODP, OTP	None	OpenDocument Presentation	Options XML File	
OpenDocument Spreadsheet	ods, ots	None	OpenDocument Spreadsheet	Options XML File	
OpenDocument Text Document	ODM, ODT, OTT	None	OpenDocument Text	Options XML File	
PDF	PDF	None	PDF	Options XML File	
Portable Object	PO	None	Portable Object	Options XML File	
Deprecated - QuarkXPress Export (Studio 2011)	QuarkXPress Export (Studio		QuarkExpress Export (Studio 2011)	Options XML File	
QuarkXpress Export	TAG, XTG	None	QuarkXpress Export	Options XML File	
SubRip	SRT	None	SubRip	Options XML File	

File Type	pe Extension Preparatory Steps Filter Type		Filter Type	Associated File	
SDL Web W3C	CAT, CATX, CMP, CMPX, FOL, FOLX, ITS, KEY, KEYX, PAG, PAGX, STR, STRX	None	W3C ITS Compliant	Options XML File	
Deprecated - Tab Delimited Text (Studio 2011)	ТХТ	None	Tab Delimited Text (Studio 2011)	Options XML File	
Tab Delimited Text	ТХТ	None	Tab Delimited Text	Options XML File	
Text	ТХТ	None	Text	Options XML File	
W3C ITS Compliant	XML	None	W3C ITS Compliant	Options XML File	
XHTML 1.1	XHTML 1.1 HTM, HTML		XHTML 1.1	Options XML File	
XML: Author-it Compliant	XML	None	Author-it Compliant	Options XML File	
XML: MadCap Compliant	HTM, HTML	None	MadCap Compliant	Options XML File	

Supported Languages

All supported SDLX languages are available for selection as source and target languages. However, there may be a language mapping issue when using Studio File Types and translating in SDL Trados Studio for certain region-specific locales. For more information, please refer to http://kb.sdl.com and also to the dedicated SDL TMS online community available at https://community.sdl.com/.

Accessing SDL TMS

In order to access SDL TMS, you need an Internet browser. The current version of TMS has been tested with:

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- Mozilla Firefox ESR 45
- Microsoft Internet Explorer II
- Microsoft Edge (starting version 25)
- Google Chrome (starting version 54).

Log in and log out

To log in to SDL TMS:

- 1 Launch your web browser and ensure that your Internet browser settings allow pop-ups.
- 2 In your browser's address bar, type the SDL TMS URL (web address) and press Enter. If the connection is successful, you can see the login screen. If the SDL TMS license agreement is displayed, contact your system administrator.

Username	
Password	
	Forgot password
	Login

3 In the login screen, type your user name and password in the respective boxes and click the **Login** button.

Forgotten password?

In case of forgotten password, click the Forgot password link on the login screen and then, in the password recovery form, type your SDL TMS user name and your e-mail address and click Reset. You will receive a temporary password valid for one login session only.

<u>+</u>	
mail address	
	Log in

After you log in with the temporary password, create a new password in the Users > Edit screen.



The Forgotten Password feature may not work for you if your user account has been configured through Directory Services. If this is the case, contact your SDL TMS administrator.

SDL TMS KEY CONCEPTS

You should familiarize yourself with the concepts outlined below before you start working with SDL TMS.

Organizations and Privacy

All work in SDL TMS is performed for a particular organization. An organization may represent an external client or an internal business unit. Each organization has its own set of translation rules and costs. For example, each organization has its own lists of file types handled, language pairs available, users and translation costs.

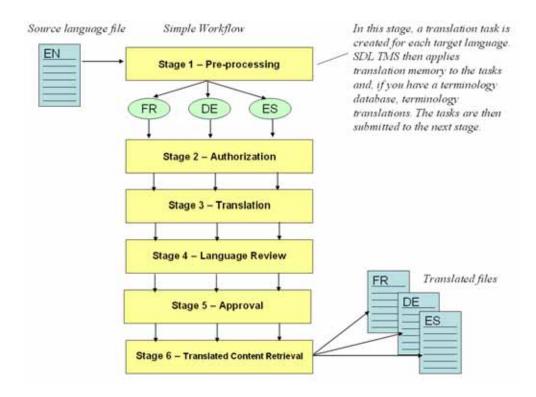
Organizations can also have their own sub-organizations. Sub-organizations are organizations in their own right and have their own set of rules and costs but they can also use those belonging to a parent organization. For example, the users set up to perform tasks for a parent organization may also perform tasks for a sub-organization. Unless the parent organization has been made private, all users who work for the sub-organization can see and work with both the sub-organization and the parent organization.

SDL TMS has a privacy setting, which can be applied to an entire organization or elements of the organization settings or data. Anything that is private cannot be seen by other organizations. All jobs created for an organization are automatically made private.

Workflows

SDL TMS uses workflows to control the passage of tasks through the translation process. A workflow consists of a number of separate workflow steps arranged in a sequence. Each step contains a different piece of processing to be performed on a task. Some steps are performed by the SDL TMS application and some are performed by people. Steps performed by SDL TMS are known as 'System' steps and steps performed by people are known as 'Human' steps.

In the example workflow below, the first step is Pre-processing. Pre-processing is a System step where translation tasks are created, and translation memory and PerfectMatch are applied. The second step is Authorization, this is a human step where a person gives the authorization for translations to be performed.



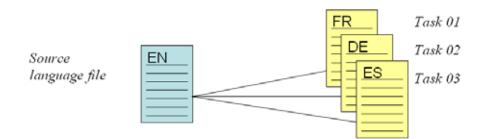
A user or user group is assigned to each Human workflow step for each language pair. When a task reaches a step for which you are responsible, you are notified by email that you have work waiting and the task is placed in your SDL TMS inbox.

At the end of each step, when the work of the step is finished, the task must be submitted to the next step. The person responsible for the next step is notified by email that they have new work and the task is moved to their SDL TMS inbox. When you receive a new task, if you feel that the work done in the previous step has not been completed correctly, you can return the task to the previous step for correction.

Human workflow steps can also be assigned to an external localization vendor.

Jobs, Items and Tasks

Files sent to SDL TMS for translation are put into a job and the job is given a name or numeric ID. During the Pre-processing workflow step, a translation task is created from each source language file for each target language. For example, if five files were submitted for translation into five languages, this would result in 25 translation tasks being created. Each task is given a numeric ID.



In SDL TMS, source files are referred to as **Items**. On screens where **Items** appear, the word **Items** is usually a link to a screen where you can see a list of the source files and select a file name to display the file in the browser.

PerfectMatch

PerfectMatch is a tool used by the system to pre-translate files. PerfectMatch takes translations from previously translated versions of the same document, or other documents from the same folder structure, and applies the translations to identical segments in new tasks. PerfectMatch also checks segments for context match as well as source text match. PerfectMatch is performed during the pre-processing workflow step when files in new jobs are being prepared for translation.

- Segments translated by PerfectMatch are automatically locked and are marked as Confirmed translations.
- Only translations created and stored in SDL TMS can be used by PerfectMatch.
- PerfectMatch is applied before Translation Memory.

Translation Memory

A Translation Memory (TM) contains approved translations which SDL TMS applies to new tasks during the pre-processing workflow step. This significantly reduces the number of words to be translated.

It is possible to apply a single translation memory or a series of translation memories to each new task. The SDL TMS system administrator specifies which translation memories are applied. They can also create a working TM. A working TM is a repository where translators can share a translated segment as soon as it has been translated.

Machine Translation

Machine translation refers to automated translation performed by a computer. If you are using machine translation, it is applied to segments that remain completely untranslated after PerfectMatch and translation memory have been applied. Segments translated by machine are easily identified in the **Translation Interface** as they are colored purple.

Users and Groups

Users are the people who perform the work in SDL TMS. A group is a group of users who perform the same role. For example, you may have a French translators group and a Project Managers group. A user or group is assigned to each workflow step, for each target language. When tasks reach a step assigned to a user, the tasks are placed in the user's SDL TMS inbox and, if the workflow step is configured to send email notifications, then an email is sent to the user or the group assigned to the next step, telling them that there is new work waiting.

When tasks reach a step assigned to a group, the tasks are placed in the inbox of every group member and all members are sent an email notification of the new work. Group members then examine the tasks and take ownership of individual tasks until all tasks belong to individual users and not to the group. Once a group member has taken ownership of a task, other group members can no longer access the task.

SDL TMS permissions are assigned to a group, not to an individual user. All members of a group inherit the permissions assigned to the group.

For more information about working with users and groups, *see About Users and Groups* on page 9-2.

Permissions

1

Access to SDL TMS screens and navigation tree options is controlled by permissions. Permissions are assigned to groups and all members of each group inherit the permissions assigned to the group. If you belong to more than one group, you inherit the combined permissions assigned to all of the groups of which you are a member.

SDL TMS Inbox

All users have an SDL TMS inbox. This is where all of your SDL TMS work is placed. Select a task from your inbox and it is displayed on the screen appropriate to the current workflow step. For example, tasks at the translation step are displayed on the **Translation Interface**. Tasks remain in your inbox until you submit them to the next workflow step. For more information, see *Working with your SDL TMS Inbox* on page I-26.

Working Online and Offline

You can perform tasks online in SDL TMS or, if you have the necessary software on your computer, you can download tasks and work on them offline.

For example, if you have either SDLX or SDL Trados Studio installed, then you can download tasks from SDL TMS and complete the translation offline. Tasks completed offline must be uploaded again to SDL TMS in order for the task to be submitted to the next workflow step.

Moreover, starting with SDL TMS 11.3, translators and reviewers can download from TMS, perform work and upload TMS projects, all from within SDL Trados Studio. All actions are available after installing the **Commute** plug-in available in the "My Downloads" screen.

Personal Home Page

When you log into SDL TMS, the first screen that you see is your Home page. The default Home page is the **Inbox View** screen. This is also accessible by clicking the **Home** navigation button and selecting the **Home** option from the navigation tree. However, you can change the default Home page to another screen, for example, the **Project To Do List** screen, **Create Job** screen or **Organization** - **Overview** screen. To choose a different Home page, click the **Home** navigation button and select the **My Details** options from the navigation tree. The **Home page** option is on the **User Preferences** tab.

Maintaining your Personal Details

You maintain personal details such as your name, email address, login name and password on the **User Details** screen. This screen is displayed when you click the **Home** navigation button and select the **My details** option from the navigation tree. This is also where you specify preferences that control the way SDL TMS looks and functions for you.

Vendors

A vendor is a localization service provider. If you regularly use vendors to perform your translations, the vendors can be added to SDL TMS and can be assigned to workflow steps. Vendors have limited access to SDL TMS and can only see information about themselves and the tasks they are performing.

Certain workflow steps can be vendor-enabled; this means that at Authorization, the project manager can choose to assign a vendor to that workflow step for individual tasks or for all tasks for a language pair. All human steps in a workflow can be vendor-enabled apart from **Authorization**, **Exception** and **Recovery**.

The tasks in a single job may be assigned to different vendors, however there can never be more than one vendor assigned to a single task. For example, you cannot have Vendor A assigned to the **Translation** step and Vendor B assigned to the **Language Review** step for the same task.

SCREEN LAYOUT AND SYSTEM NAVIGATION

All SDL TMS screens have the same general layout as the example below. The navigation pane appears on the left, work is performed in the work area on the right and actions appropriate to the current screen are available using the action buttons on the ribbon. The title displays the name of the current screen.

Navigation Pane	Title Bar/	Breadcrumbs	Ribbon	Work Area	Top Bar
		Demo Organization + Users & Groups + Users +	June Johnson		001
DL Management System	test Refeat	Est Device Add User Researcy Versional		/	
🖡 🏭 Inbox	Page	Actions	/		
Create Job	User Details		III Usage		DiSearch
Project To Do List	Name	Jane Johnson	Name	- Type	- Organization
Project Daily Summary	Description	French translator	Damo Group	Group	Demo Organization
Wy Downloads	Statio	×	Demo Basic Worknow (Live)	Workflow	Demo Organization
C Ay Details	Private	×	Demo Three (J ve)	Workflow	Demo Organization
	DS user	×	Demo2 Westion	Workflow	Demo Organization
	Usemane	Jane Johnson	Demo2 (Jorkflow (Live)	Workflow	Demo Organization
Navigation Tree	Email address	johnson@gmail.com	Showing 1 to 5 of 5 entries		First Previous 1 Next Last
Navigation Tree	Address				
	Telephone no.				
	Disable login	×	/		
	User Preferences		Translation Interface Preferences	\$	
	Locale	English (United States)	Segments per page	100	
	Toobar display	Default	Display terminology	~	
	Information messages	9	Show white space	×	
	Display time	2	Hide source tags	2	
	Decimal places	2	Enable autopropagation	×	
	Personalize tables	~			
	Home page	Inbox	Group Share Preferences		
	Translation Portal	Dasic	Name		
Understine Take	Email format	HTML	Default GroupShare Location	-	
Navigation Tabs	Email frequency	1 Hour	UM .		
	Last Mail Check	08/23/2010 12/22	Usemane	-	
/	Allow Impersonation	2			
Home	Download Packages	Studio Package			
Projects	TMS API Enabled	×			
	TMS API Key	1			
Reports					
Setup	Additional Information				
	Language	English (United States)			
Q Search	Rating				

Navigation Pane

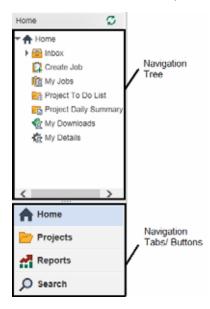
The navigation pane provides access to your work and to SDL TMS data, having the navigation buttons on the bottom half and the navigation tree on the top half. The navigation tree is dynamic, meaning that it is regularly updated with new information.

Click the navigation buttons to display different menu options from the navigation tree. Select an option from the navigation tree and the screen appropriate to the selection is displayed in the action area on the right. For example, when you click the **Home** navigation button and select the **Inbox** option from the navigation tree, your SDL TMS inbox is displayed.



NOTE

The options available in the navigation pane vary depending on your permissions. For more information on additional options, see the SDL TMS Administrator Guide..



Navigation Buttons	Description
Home	Access your Home page, Inbox, Project To Do List, Project Daily Summary, Create Job, My Downloads and My Details pages.
Projects	Manage your projects. For more information, see <i>About Projects</i> on page 8-2.

Reports	Run reports on your job data such as Job Invoice reports or Cross File
	Repetition Analysis reports. For more information, see Introducing
	Reports on page 11-2.
Search	Search SDL TMS for jobs, tasks, translation memories, users and groups. For more information, see <i>Searching for Jobs and Tasks</i> on
	page 1-22.

Hiding the Navigation Pane and Expanding the Work Area

To increase the size of the work area, place the cursor over the vertical bar that forms the border between the navigation pane and the work area. When the cursor changes to a double headed arrow, drag the border into the required position. You can move it back again using the same method.

Searching for Jobs and Tasks

The **Search** navigation button enables you to search for a particular:

- 🖪 Job
- Task
- Translation Memory
- Translation Memory Sequence
- User
- Group
- Terminology.

Under For a, click the down arrow to display a list of search types for selection.

Search			0
Go To			
Job 🗸	#		۵.
Live data or	ily		
→ Main Se	arch		
Look in	All Organiza	tions 💊	0
For a	Job	×	0
That	Contains	×	0
Keywords			0
- More op	tions		0
Archived	⊖Yes	No	
			0
All Dates			\sim
	P Search		

When you select a search type, other fields appropriate to the search type are displayed under **More Options**. In this example, the fields used for a Job search are displayed:

Search				0			
Go To							
Job 🗸	#						
Live data onl	У						
- Main Sea	rch						
Look in	All Org	anizatio	ons	v 0			
For a	Job			v 0			
That	Contair	15		v 0			
Keywords	Transla	ation		0			
+ More opti	ons			0			
Archived	OYes		No				
→ Date				0			
Created Da	Created Date						
Obetween		In the second	the last	t			
15	×	day(s	i)	\checkmark			
	۶Q	earch					

Complete the fields and click the **Search** button to start the search. Search results are displayed in the work area of the screen. Click a link in the work area to display the found item.

Customizing Screens containing Tables

Where the current screen contains a table (or tables) you can customize the table(s) by:

- Adding or removing columns.
- Changing the column order.
- Specifying how the table rows should be sorted.
- **Specifying the maximum number of rows that can appear on the table.**

Customization is performed in the Table Personalization window.

Table Personalization			×
Available Columns	Selected Columns	Sort By	Rows Per Page
Static Private	Active * Organization	Name *	100
TM Sequences Workflows Guid	Name *	Ascending	
	Description File Types	O Descending	
	 Language Pairs Project manager In Use 		Apply Reset Cancel

To display this window, click the **Customize this table** icon. This icon appears on the title bar of every customizable table.

100 TW (Organiza	lion ⊧ Co	nfigurations						0	Θ	1
Back	P Refresh	B Info	Add Configuration								•
	Page		Action								
Cor	figuration	15									
Active	Organ	ization	Name	٠	Description	File Types	Language Pairs	Project Manage	r	In Us	e
All	• TWO	rganiza 🔻								All	٠
~	TWO	ganization	Passolo Configuration		Demo	DOC, DOCX, Passolo Translation Bundle (Native)	EN (US) > DE			×	1
	Cus	tomize th	his table icon								

Refer to the online Help for a detailed description of how to use the table personalization options.

Working with Drop-down Lists

The values in drop-down lists are displayed alphabetically.

If a value in a drop-down list is very long, it may be truncated (the end characters are cut off). Place the cursor over a truncated value to display the complete value as a tooltip.

=	

NOTE

The tooltip is only available if you are using Mozilla Firefox as your web browser. It is not available if you are using Internet Explorer.

WORKING WITH YOUR SDL TMS INBOX

Your SDL TMS inbox contains all of the tasks currently waiting for your attention. From here you can select a task and it is displayed on the screen where you can do the required work on the task. Tasks remain in your inbox until you choose to submit them to the next workflow step. This means that you can do some work on tasks and then return to them later.

Your inbox is displayed when you click the **Home** navigation button and select **Inbox** from the navigation tree. Your inbox has two levels: **Inbox View** and **Inbox View** (**Tasks**).

Inbox View is the top level view and displays jobs that contain tasks for you to work on. This is the view displayed when you select the **Inbox** option from the navigation tree. The **Inbox View (Tasks)** level displays tasks for a job selected at the top level.

Sel	ect a job to tał	ke ownership	o of tasks orto download files	The sa step/lar	me job appears m nguage pair conta	nore than once. I ining the tasks	t appear	s separately fo	r each workflow
Baci	-			Take Oumership Re	Sign To Reastign T	fo GroupShare			
	Hage	,	Actions Files		Jobs	GroupShare			
	nboxView			/					
	Organization	Project	Job	Task Count	Workflow Step	Language Pair	New	Word Count	Tasks Assigned
	Demo Organ v			/	All T	Al T			
	Demo Organization		A Job	1 🖗	Translation	RO > FR	4	4	
	pemo Organization		Concordance search screenshots	1 🖗	Translation	RO≻FR	0	32	18
	Demo Organization	Song 2	Demo Three	1 🖗	Authorization	EN-GB > PT	209	258	
ď	Demo Organization	Guide 1	Guide 1	1 🖗	Authorization	RO > EN-GB	45	99	
	Demo Organization	Guide 1.1	Guide 1.1	1 🖗	Authorization	RO ≥ EN-GB	45	99	
	Demo Organization	Introduction	 Introduction III 	1 🖗	Translation	EN-US > EL	64	64	18
	Demo Organization	Job Example 1	Job Example 1	1 🖗	Authorization	EN-GB > PT	183	224	
	Demo Organization	Introduction	Job Example 2 🗐	1 顷	Authorization	EN-GB > PT	149	105	
	Demo Organization	Introduction	Job Example 3 💣	1 🖗	Authorization	EN-GB > PT	164	278	
	Demo Organization		Multiple Tasks 2	2 🖗	Translation	EN-US > ES	109	163	18 18

Inbox View example:

Click a link here to display the Inbox View (Tasks)

These jobs contain tasks assigned to groups

Click a link in the Task Count column to display the selected tasks on the Inbox View (Tasks) screen.

Inbox View (Tasks) example:

Ir	ibox Vie	w (Tasks)				Click to	iew the	e task his	tory						
0	lohn Do	Revert +	Inbox + D	emo Thi	ee (Ai	uthorization	EN-G	38 > PT)							0
Bac	k Refe	sh Info	Submit	Reject	Dow	micad Uploa	× .	Take wnership	Reass		То	GroupShare			
	Pa	20 \	A	ctions		Files			Tas	ks		GroupShare			
	Inbox Vie	w (Tasks)													
	Status		R F	ename		Due Date	Task	Com	ment	Workflow Step	*	Language Pair	New	Word Count	Users Assigned
)	/		Authorization	٣	EN-GB > PT v			1
			6	Demo Th		02/08/2016 15:00		22		Authorization	ß	EN-G8 > PT	209	258	Unassigned
		Click to p task in th				Click to op the Transl								No user has ownership of	

Field Descriptions - Inbox View and Inbox View (Tasks)

> NOTE

The field descriptions below describe all of the available fields for the inbox tables. For more information on how to customize your field display, see *Customizing Screens containing Tables* on page 1-24.

Field	Description
	Select this check box to identify the task for up/downloading or for moving to the next workflow step.
U	If this box is disabled the task has been taken by another group member. If the task has a special level of priority it is indicated here: = High priority = Low priority
R	Blank = Normal priority. If this task has been returned to you for remedial action, the Rejected icon appears here. Read the task comment to find out why it has been rejected.

Due Date

Date by which you must complete all work on this task. If there is no date, no due date has been set for the task.

E	
---	--

NOTE

In the main **Inbox**, the **Job Due Date** refers to the date by which you must complete all work on this task. The **Step Due Date** is displayed if the job belongs to a project and a deadline is set for the current workflow step.

► NOTE

The **Estimated Delivery Date** is an estimation of the date when all work in a job is complete. It is obtained by adding to the initial job due date a realistic **Duration**, that the job's Authorizer fills in by editing the job, at the Authorization step.

Only available in Inbox View (Tasks).

Filename Name of the source language file sent for translation. Click this to open the task in the Translation Interface.

Click the **Preview** icon that precedes the file name to preview the file.

Folder Only available in Inbox View (Tasks). If the job was created automatically by SDL Nexus, this shows the local address of the file.

Fuzzy Total number of words translated during pre-processing with a less than 100% translation memory match.

Group Only available in Inbox View (Tasks). If this task was originally assigned to a group, the name of the group name appears here.

Hundred The number of words which were translated during pre-processing with a 100% translation memory match.

At job level, this shows the number of files available for downloading either as .sdlxliff or as .itd files.

At task level view, arrows are used to indicate the download status of a bilingual file.

The arrows appear in front of the bilingual file icon

This file has been downloaded.

Ô

This file has been uploaded.

This file is in the process of being uploaded.

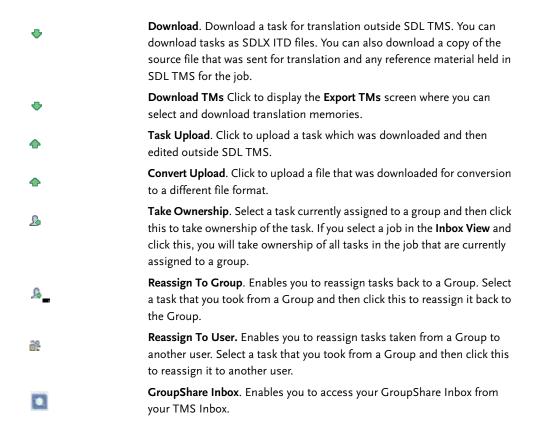
Status

1

	Job name. If this icon $\ _{m{ extsf{a}}}$ appears after the job name, some reference			
Job	material has been added for the job or for the project to which the job belongs.			
Language Pair	Jobs can appear more than once in your inbox. This is because tasks for each language pair in the job are displayed separately.			
New	Total number of new words in the tasks. New words are words not found in the translation memory during pre-processing.			
Organization	The job was created for this Organization.			
PerfectMatch	The number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files. At job level, this number is the total number of words in all tasks in the job that have been translated; at task level, it is the number of words in the task that have been translated.			
Project	If the job is part of a project, the project name appears here.			
	Total number of words in repeated segments. The words contained in the first instance of a segment are not included in this total.			
Repetitions	NOTE			
	Repeated word counts do not appear by default. If you want to see repetition figures, you must ask your system administrator.			
Segments	Total number of segments in the tasks.			
	Only available in Inbox View (Tasks) .			
Task	Task ID (numeric identifier). Click a link here to display the Task History screen for the task.			

Only available in Inbox View.

	If the tasks in the job were originally assigned to a Group, the entries here tell you how many tasks are still assigned to the group, how many have been taken by other group members and how many you have taken.
Tasks Assigned	A gray icon represents the group. The number that appears with the icon is the number of tasks currently assigned to the group.
	A blue icon represents you. The number with the icon is the number of tasks you have taken.
	A red icon represents other members of the group. The number with the icon is the number of tasks other group members have taken.
Task Count	Total number of tasks in your inbox for this job/ language pair. Click either the task number link or the Inbox View (Tasks) icon to display the tasks on the Inbox View (Tasks) .
Users Assigned	Only available in Inbox View (Tasks) . Name of the user assigned to this task. If the task is currently assigned to a Group, the word Unassigned appears here. If a task has been taken by another member of the group, the user's name appears here and the task details are grayed out.
Word Count	Total number of words in the tasks. This total is broken down in other columns to show how many of these are new words, how many are 100% TM matches or PerfectMatches and how many are fuzzy matches.
Workflow Step	Indicates what you are expected to do with this job/task. For example, Translation, Review, Authorization. If a job is at the Authorization or PJM Authorization step: Click the Authorization icon to display the job on the Authorization screen, or Click the Authorization Summary icon to display the job on the Authorization Summary screen.
φ	Submit. Submit selected tasks to the next workflow step. To select a task, select the box that precedes the task. When you have finished selecting tasks, click this to send them to the next workflow step. At job level, you can select a job and then click this to submit all tasks in the job to the next workflow step.
•	Reject . Return selected tasks to the previous workflow step for correction. To select a task, select the box that precedes the task. When you have finished selecting tasks, click this to return them to the previous workflow step.



Selecting Tasks from your Inbox

If the job is with you for authorization or PJM authorization, click one of the icons in the **Workflow Step** column of the **Inbox View** screen. One icon displays the **Authorization Summary** screen and the other displays the **Authorization** screen. For more information about performing the Authorization or PJM Authorization workflow step, *see Chapter 3 About Authorization and PJM Authorization*.

If the job is with you for translation, review, approval or engineering, click a link in the **Task Count** column to display the **Inbox View (Tasks)** screen. On this screen, click a link in the **Filename** column to display the task on the **Translation Interface**. For more information about performing the Translation or Review workflow steps, *see About Translating and Reviewing* on page 4-2. For more information about performing Approval, *see About Approving Tasks* on page 5-2.

Downloading Files from your Inbox

You can download tasks from SDL TMS and work on them offline. You can also download translation memories. When you have finished working on downloaded tasks, they must be uploaded again and submitted to the next workflow step.

You can download tasks individually or you can select a group of tasks and download them all at the same time. All tasks are automatically zipped for downloading. You can also download tasks as Studio packages and open them in SDL Trados Studio for translation or review.

For more information about downloading files and translation memories, *see Chapter 4 Translating and Reviewing*. For more information about downloading files in a package, see *Chapter 7 Managing Jobs and Tasks*.

Taking Ownership of Tasks Assigned to a Group

For more information about taking ownership of tasks assigned to a group and reassigning group tasks, see *Chapter 4 Translating and Reviewing*.

Working with the SDL GroupShare Inbox

The **GroupShare Inbox** feature enables you to publish and retrieve TMS jobs/tasks to SDL GroupShare from the TMS User Interface (UI). This integration enables you to single-click publish and single-click retrieve, therefore increasing productivity, gaining more control over the translation cycle and ultimately working faster and in a more cost-effective manner. For more information about the SDL TMS - SDL GroupShare integration, see the *SDL TMS - GroupShare Integration Quick Start Guide*, available in the **My Downloads** screen.

1

ALLOWING IMPERSONATION

Sometimes it may be necessary for someone else to access your SDL TMS account. For example, if you have reported a problem, the system administrator may want to see the problem for themselves. The **Allow Impersonation** function enables another user to access your SDL TMS account as you, without logging in using your user name and password.

If you are asked to enable impersonation and you are willing to allow it:

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the **My details** option from the navigation tree. The **Users** > **Edit** screen is displayed.
- 3 Click User Preferences to display the User Preferences tab.
- 4 Select Allow Impersonation and click Submit.

Impersonating Another User

To impersonate another user, you must have been assigned the necessary permissions. Also, the user to be impersonated must have enabled the Allow Impersonation function.

To impersonate another user:

- 1 Click the System navigation button. The System navigation tree is displayed.
- 2 Select the Impersonate Others option from the navigation tree. The Impersonate Others screen is displayed.



NOTE

The **System** navigation button is only available in the navigation pane if you have administrator permissions. For more information, see the SDL TMS Administrator Guide.

- 3 Start typing the user name of the user to be impersonated. Matching names are listed in a box that appears on the right.
- 4 Select the required name from this box and click the **Impersonate Others** button. A confirmation dialog box is displayed.
- 5 Click **Yes**. You are now switched to the other user's SDL TMS account.

When you have finished impersonating the other user, go to the user's Inbox and click the Revert link that appears in the screen title. You are immediately switched back to your own account.



CREATING JOBS

This chapter provides an overview of working with jobs in SDL TMS. Sections include:

- About Creating Jobs
- The Create Job Screen
- Creating a New Job

Chapter

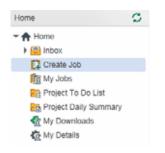
2

ABOUT CREATING JOBS

The **Create Job** option enables you to create a new translation request, a Job, by selecting files and uploading them to SDL TMS for processing. Jobs are created on the **Create Job** screen. This screen is displayed when you click the **Home** navigation button and select the **Create Job** option from the navigation tree. You can also reach the **Create Job** screen from the **Projects** navigation button.



Create Job is only displayed as an option if you have the necessary permissions.



Configurations

When you create a new job, you select a Configuration. A Configuration is a set of rules that define:

- □ What types of file can be included in the job.
- □ Which language pairs are available.
- □ Which translation memories are applied and updated.
- □ Which workflow will be used to process the job.
- □ Which TM attributes to apply (optional).
- The values for TM Attributes for the job you are creating (optional).
- □ Whether tasks from this job can be sent to an external localization vendor for translation.
- □ Whether PerfectMatch will be used to translate files and, if so, which files will be used by PerfectMatch. *See PerfectMatch* on page I-I6 for more information about PerfectMatch translations.

Optionally, a configuration may also determine which terminology databases are applied and updated, how translation costs are calculated and who the project manager for the job is. Configurations are organization specific. You may have several Configurations to choose from or you may always use the same one.

→ NOTE

If more than one workflow is available on the Configuration, the default workflow is always used to start new jobs. However, when jobs reach the Authorization or the PJM Authorization step, the person performing authorization can switch tasks to a different workflow.

The Create Job Screen

New jobs are created on the **Create Job** screen. All files that are submitted for translation at the same time become a single new job. A job can also include resource (supporting) files, for example, instructions for translators and PDF versions of the files to be translated.

The **Create Job** screen contains up to eight tabs. However, they may not all require completion or be available for completion. The configurations available to you, and in particular the configuration you choose, determine which tabs are active. For example, if you choose a configuration that contains PerfectMatch options, the **PerfectMatch** tab will be enabled.

The tab color indicates whether the tab is mandatory, optional or not available, as follows:

- red tabs are mandatory,
- grayed-out tabs are disabled and cannot be completed,
- white tabs are tabs that are being completed,
- **g**ray tabs are either optional tabs or tabs that have already been completed.

[Create Job	0 (•
	breit	
Page Ac Job Details Files Languag	tion pes & TM TM Filter TM Attributes Vendors PerfectMatch Job Creation Summary	
Job name	Example Job	0
Job description	Meaningful description of the job. This appears in various places throughout the application.	0
Choose organization	My Organization	0
Choose configuration	Passolo Configuration * Song Demo	0
Project	None •	0
Due date	08/29/2016 11:36 🖿	0

These are the **Create Job** screen tabs:

Tab	Description
Job Details	This is where you name the job, add a job description, choose a configuration, specify a due date for the job and optionally add the job to an existing project or create a new project for the job.
Files	This is where you select the files to be translated and any reference files. The configuration you choose on the Job Details tab determines which types of file you can select for translation. There is a maximum size limit of 100MB per file. This is not a limit on the size of the job; together, all files in a job may total more than 100MB. There is also a file upload time limit. If a single file takes longer than 10 hours to upload, the file will be timed out and the job will not be created.
Languages and TM	This is where you specify the source language of the files to be translated and the required translate-into languages. Optionally you can also choose to override the default TM sequence.
TM Filter	This is where you can create translation memory filters. When applying translation memory to document segments, translation memory entries that match the filter are given priority over non- matching entries.
TM Attributes	This is where you can specify default values to be assigned to any new translations that are added to the translation memory at the end of the job.
Vendors	This tab lists all of the vendors available to work on this job (the list is defined in the selected configuration). If you only want certain vendors to be able to work on the job, select the vendor or vendors from the list.
	This tab will only be available to complete, if the configuration you have selected permits it to be displayed.

PerfectMatch	This is where you can refine the selection of files to be used by PerfectMatch.
Job Creation Summary	This is where you can view a summary of your selections and create the job.



Depending on your system setup, some of the options above may not be available.

Job Details Tab Description

This tab is mandatory. The configuration you choose here determines what types of files you can include in the job and which other tabs are available to be completed.

Field	Description
Job name	Enter a name for the job. SDL TMS will allow you to enter a duplicate name but you should try to use unique names as this will help other users. The job name can be a maximum of 50 characters long and cannot include the following characters:
	/ \ : * ? " < > % & #
Job description	Enter a meaningful description for the job. This appears in various places throughout SDL TMS.
Choose a configuration	Select the configuration that gives you the options you need for the job. Choose a configuration that:
	 Belongs to the organization for which you are creating the new job.
	 Contains the correct mix of file formats, languages and costs that you need.
Project	If you want to add the job to an existing project or create a new project, select the appropriate option from the drop-down menu. A new project takes the job name for the project name.
Due date	Click the Calendar icon and select the date by which all work on the job should be completed. To select a due date, click the date (you can also specify a due time at the bottom of the calendar) and then click the calendar check <i>state</i> icon.

Files Tab Description

This tab is mandatory, it is where you select the files to be translated. The configuration you chose on the **Job Details** tab determines what types of file you can select here.



NOTE

There is a maximum size limit of 100MB per file. This is not a limit on the size of the job; together, all files in a job may total more than 100MB. If a single file takes longer than 10 hours to upload, the file will be timed out and the job will not be created.

[Create Job					0	•	1
	Submit						•
Job Details Files Langua	ages & TM TM Filter	TM Attributes	Vendors	PerfectMatch	Job Creation	Summ	ary
Choose files	Remove All	Drop file:	s here or cl	ick to select.	13	1 KB	
	Mr. Bobby.bt	precated - Text, I	/icrosoft W	ord 2007-2013 (0.	4 KB	ŏ
Reference material		Drop file	s here or cl	ick to select.			
	x Instructions.txt					0 b	0

Field	Description
Choose files	Use this to select the files to be translated. Each file must match one of the file types displayed under Types of files . To upload a file, either use a drag-and-drop operation or click the Choose files area, navigate to the file, select it and click Open . You can make repeated selections until the list of files is complete. If you decide not to translate a selected document, click the x icon preceding the file name to remove it from the list. If you chose to re-use the same files that were uploaded in the last job, those files will already be listed here. You can add more files to the list or remove files until the list is complete.
Types of files	These are the types of file which can be translated using the selected configuration.
Reference Material	You can either use a drag-and-drop operation or click the Reference Material area, navigate to the file, select it and click Open. Reference material is uploaded when the job is created. Reference material can be downloaded by the users who work on this job.

Languages and TM Tab Description

This tab is mandatory, it is where you specify the source language of the files to be translated and the languages the files are to be translated into.

You can also change the default TM sequence on this tab for each file type and language pair. This option is only available if it is enabled in your selected configuration.

If the selected configuration supports TM filtering and TM attributes, this is where you select the TM sequence that contains the translation memories to be filtered and updated with assigned attribute values. If there is more than one sequence displayed here and you do not select a TM sequence, you will not be able to create filters on the **TM Filter** tab and assign attribute values on the **TM Attributes** tab. For more information, see *TM Filter Tab Description* on page 2-12.

[Create Job		0	Θ	1
	Submit			
Page	Action			
Job Details Files Langu	ages & TM Filter TM Attributes Vendors PerfectMatch			
Job Creation Summary				
Translate from	Romanian (Romania)			0
Translate into	English (United Kingdom)			0
	·			
	Select Overriding TM Sequence This option must be selected if you want to create TM filters and assign attributes.	n TM		0
	Demo TM Sequence 1			
	×			

Field

Description

Translate from

Select the source language of the files to be translated. If the selected configuration only supports one source language, that language is selected automatically.

Translate into	Select the language(s) you want the selected files to be translated into. To select a list of languages, click the first language in the list, press and hold down SHIFT, and then click the last language. To select non-consecutive languages, press and hold down CTRL, and then click each required language.		
Language specific information	The configuration you have chosen may cause additional boxes to be displayed for completion. These boxes enable you to supply language specific job data. For example, you may be asked to provide a purchase order number for each target language. These additional boxes do not appear until you have chosen one or more target languages.		
Select Overriding TM Sequence	Select this if you have more than one TM sequence displayed and you want to be able to:		
		Change the default TM sequence defined in the configuration for each file type and language pair.	
		Apply a filter to translations retrieved from a translation memory and apply a percentage match penalty to translations that do not match the filter. You can only apply filters to the translation memories contained in a single TM sequence and you must select the sequence here.	
		Assign attribute values to new translation units added to the translation memory. You can only assign attribute values to the translation memories contained in a single TM sequence and you must select the sequence here.	
	available i selection. When you translatio	a select this option, the translation memory sequences in the chosen configuration are made available for Select the required TM sequence from the list. If go to the TM Filter tab and TM Attributes , the in memories contained in the selected sequence will be for you to create filters and assign attribute values.	



If there is more than one sequence displayed here and you do not select a TM sequence, you will not be able to create filters on the **TM Filter** tab or assign attribute values to new translation units on the TM Attributes tab.

TM Filter Tab Description

This tab is where you can create a filter that is applied to translation memory (TM) translations during pre-processing. TM translations that do not match the filter are penalized by reducing their actual percentage match figure by an amount specified here. As a result, translation memory matching is weighted in favor of the translation units that match the filter.

For example, if your translation memory has an attribute field that identifies a translation as being either new or approved, and you want priority to be given to approved translations, you can create a filter which applies a 5% penalty to translations that have a status of new. In this example if two 100% matches exist for a document segment but only one of these matches the filter, the non-matching translation would be treated as a 95% match.

The **TM Filter** tab is available for completion if there is only one default TM sequence selected for this job. If there is more than one TM sequence displayed on the previous tab, you must opt to override the default TM sequence and select a TM sequence from the list. Filters can be created only for the translation memories in the selected TM sequence. If you are experienced in creating translation memory filters in SDLX or in creating SQL queries, you are already familiar with the concepts involved in creating TM filters in SDL TMS.

What are TM Attribute Fields?

In a translation memory, in addition to the source language and target language segments, each translation unit has a number of fields associated with it and these are known as TM Attribute fields. Some of these contain standard data such as the date the translation was added to the translation memory and the name of the user who added it. Other fields are organization specific and can hold any type of information, for example, the name of the client or business unit for which the translation was added.

Field	Description
Apply TM Filter	Select this to enable the create filter options. If this box is disabled, you did not select an overriding TM sequence on the Languages and TM tab.
Available TMs	These are the translation memories in the TM sequence you chose on the previous tab. You can create a filter for each one.
Filtered	A check mark here indicates that a valid filter has been created and will be applied to this translation memory. This check box automatically populates when a valid filter is created for the translation memory. To remove the filter, clear the check box.

The following fields are displayed when you expand a translation memory name. Use the fields to create a filter to be applied to the translation memory. You cannot create a filter for more than one translation memory at a time.

Field	Description		
Current Conditions	Displays the conditions currently contained in the filter for this translation memory.		
Field	This box contains a list of the attribute fields available to be used in a filter for this translation memory. The filter works by testing whether a selected field contains a value that is equal to or not equal to a value specified by you. A separate filter condition is created for each field to be tested.		
Operation	This is where you specify how the value stored in the selected field will be tested. You select the value in the Value field.		
	Equal To - Is an exact match for the value in the Value field.		
	Not Equal To - Is any other value than the one in the Value field.		
Value	Displays the values which can be held in the selected field. Choose the value you want the filter to test.		
Boolean	You can create a filter that contains more than one condition. You can create a single condition for each available attribute field or you can have several conditions that test the contents of the same field (where fields contain multiple values). The conditions are applied in the order in which they appear in the Current Conditions box and are linked using And or Or .		
	And - Both conditions must be true.		
	• Or - Either the first or the second condition must be true.		
Filter Mismatch Penalty	The filter mismatch penalty is applied to the percentage translation memory (TM) match figure of translations that do not match the filter conditions. For example, if the penalty is set at 5%, the translation memory match figure for translations that do not meet the filter conditions will be reduced by 5%.		

Filter Buttons	
Remove	Deletes a single selected condition from the Current Conditions box.
Clear	Deletes all conditions from the Current Conditions box.
Up	Moves the selected condition up one place in the Current Conditions box.
Down	Moves the selected condition down one place in the Current Conditions box.
(Inserts an opening bracket before the selected condition in the Current Conditions box. Note: Brackets are used to group conditions which must be executed together.
)	Inserts a closing bracket after the selected condition in the Current Condition s box.

In the following example, translation memory matches will be penalized by 5% if:

- □ They were not added to the translation memory for Project A.
- □ The translation has not yet been approved.

This means that if two 100% matches for a segment are found in the translation memory, but only one of them matches the filter conditions you have specified, the one that does not match the filter will be treated as a 95% match.

TM Filter	Apply TM Filter					
Create filters	Available TMs					Filter
	➡ Demo TM					2
	TM Sequences	Current conditions				0
		'Demo Attribute' EQUAL TO Project A			Remove	
		AND "Status" EQUAL TO Approved		Clear		
			Up			
		Down (
					1	
		Field	Operation	Value		
		Demo Attribute Status	Equal to Not equal to	Project A	•	
				Boolean		
				AND OR		
					Add	
	Filter mismatch penalty	6				0

TM Attributes Tab Description

This is where you can assign values to translation memory attribute fields. Attribute fields hold information about the translation and are completed when a new translation is added to the translation memory. For example, you could store the name of the project or client for whom the new translation was created.

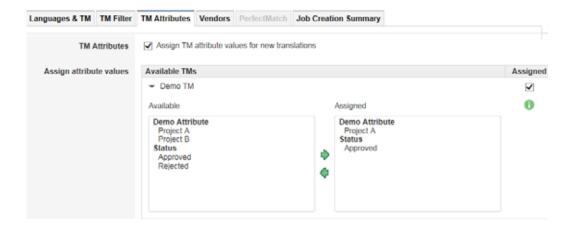
Later, when SDL TMS is applying translation memory matches to source language segments in new tasks, you can choose to give priority to translations that have particular values in the attribute fields. This is done at job creation using a TM Filter.

The **TM Attributes** tab is only available for completion if there is only one default TM sequence selected for this job. If there is more than one TM sequence displayed on the **Languages & TMs** tab, you must opt to override the default TM sequence and select a TM sequence from the list in order to assign attribute values. Attribute values can be assigned only to translation units for the translation memories in the selected TM sequence.



NOTE

- Assigning attribute values to new translation units on this tab, overwrites any default values that would otherwise have been assigned.
- If the setup for your selected TM Sequence specifies that none of the translation memories in the sequence can be updated, this tab will be disabled.



Field	Description
	Select this to enable the 'assign attribute value' functionality.
Assign TM attribute values for new translations	NOTE This option is only available if you have selected the Select Overriding TM Sequence check box and a default TM sequence on the Languages and TM tab.

When you select the **Assign TM attribute values for new translations** box, the translation memories contained in the TM sequence that you selected on the **Languages and TM** tab are displayed.

Field	Description
Available TMs	These are the translation memories in the selected TM sequence.
Assigned	A check mark here indicates that you have chosen some attribute values to be assigned to new translation units when this translation memory is updated. This check box automatically populates when you choose the attribute values to be assigned. To remove all selected attribute values for this translation memory, clear this check box.

Click and expand a translation memory name to display the attribute fields available for the translation memory and the values which can be assigned to the fields. You can only work with one translation memory at a time.

When expanded, the following fields are displayed for the selected translation memory.

Field	Description
Available	The entries in bold are attribute field names. Under each field name is a list of the values which can be assigned to the field. To assign a value to a field, select the required attribute value and click the right arrow to move it to the Assigned box.
Assigned	These are the attribute fields and values you have selected. The selected fields will be updated with the chosen values when a new translation is added to the translation memory at the end of the job.

Vendors Tab Description

If the configuration you have chosen permits tasks to be assigned to external localization vendors, this is where you select the vendors you want to use on this job.

- This tab is not displayed if:
 - □ There are no configurations available that are vendor-enabled.
 - The Vendor Tab Enabled check box on the Optional Elements tab of the Configurations/Add screen was not selected when you created the vendor-enabled configuration. See Chapter 14 System Messages, of the SDL TMS Administrator Guide for more information.
- This tab is grayed- out if one or more of the configurations available are vendor-enabled. It only turns green if you choose a configuration that is vendor-enabled.

🔯 Create Job			08	1
Back Refresh Info	Submit			
Page	Action			
Job Details Files Lar	guages & TM TM Filter TM	Attributes Vendors PerfectMate	h Job Creation Summary	
Select vend	ors Snow Inc.	~		0

To select a vendor or vendors, click the vendor name(s) in the **Select vendors** box. To select multiple vendors, use the CTRL and SHIFT keys. When you select a vendor, a field appears below the **Select vendors** box listing the language pairs/directions that the vendor supports.



NOTE

The vendors that appear for selection in the **Select vendors** box are based on the languages selected in the **Languages and TM** tab. For example, if you chose to translate from US English into German and French on this tab, only vendors that support the language directions EN-US > DE and EN-US > FR would appear in this list.

If the selected vendor is the only vendor that handles one of the language pairs you have selected, the vendor is automatically assigned to all vendor-enabled steps in the workflow for that language pair.



NOTE

If you do not select vendors on this screen, the project manager will be able to select them when they are authorizing the tasks in this job.

PerfectMatch Tab Description

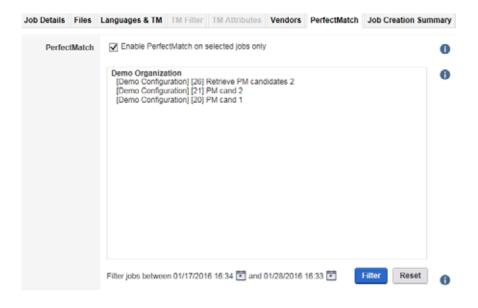
PerfectMatch translations are taken from earlier versions of the same file or related files that were previously translated and approved in SDL TMS. If the configuration you have selected contains PerfectMatch options, you can use this tab to limit the selection of files to be used by PerfectMatch to files that were translated during a specified date range.

When you select **Enable PerfectMatch on selected jobs only**, the tab displays a list of all jobs that could be checked for the presence of files which could be used by PerfectMatch.

- □ You filter jobs out of the list using the date on which the job was created. Use the calendar icons to create a date range and click **Filter**, jobs created outside the date range are removed from the list. To restore the list to its original state, click **Reset**.
- If **Enable PerfectMatch on selected jobs only** is selected when the job is created, only the jobs listed here will be considered by PerfectMatch.

NOTE

This tab is disabled if the configuration you have chosen does not contain PerfectMatch filtering options.



Enable PerfectMatch on

selected jobs only

Description

Select this to enable PerfectMatch job filtering. When you select this option a list of jobs appears in the box below. These are jobs that could potentially contain files to be used by PerfectMatch. For example, if the configuration you have chosen uses Organization as a PerfectMatch file selection condition, all jobs for that organization will be listed.

At this point the list is not a list of jobs that definitely contain files which can be used by PerfectMatch. This is because you have not yet created the job and SDL TMS does not actually know what files will be included in the job. Because of this no file name matching can take place.

You can now refine the list by specifying a date range using the **Filter jobs between** option.



NOTE

Once you have selected this option you must specify a date range. If you decide not to filter the jobs by date de-select this option.

Filter jobs betweenThis is where you create a date range and then filter jobs falling
outside the date range out of the list.

- First, create a date range using the calendars to define the range start and end dates.
- Click **Filter**. When you click **Filter**, all jobs created outside the date range are removed from the list.
- From the remaining jobs, select the ones that you want to be used by PerfectMatch. When you select a job, the job description (if there is one) is displayed at the bottom of this box.

You can click **Reset** at any time to restore the complete list of jobs.

When you actually create the new job, the jobs selected here will be checked for files which can be used by PerfectMatch.

Field

Job Creation Summary Tab Description

The **Job Creation Summary** tab contains a summary of all the selections you made on previous tabs. If you want to change a selection, select the appropriate tab and make the change. When you are satisfied that all of the job information is correct and complete, click the **Create Job** button to upload the files and create the job.

	bmit					
Job Details Files Languag	es & TM TM Filter TM Attributes Vendors PerfectMatch Job Creation Summary					
Name	Job Example					
Configuration	Demo Configuration (Demo Organization)					
Due date	08/29/2016 12:58					
Files	Word Demo.docx Translation Demo.txt					
Reference material	Instructions.bt					
Translate from	Romanian (Romania)					
Translate into	English (United Kingdom)					
Current TM Sequences	Demo TM Sequence 1					
Apply TMs Filter	Demo TM (Penalty Value: 5) "Demo Attribute" EQUAL TO Project A AND "Status" EQUAL TO Approved					
Update TMs Values	Demo TM Demo Attribute (Project A) Status (Approved)					
Selected Vendors	Snow Inc.					

Creating a New Job

Before you start:

- Locate the files to be included in the job.
- Remember that all files in a job must be in the same language.

To create a job:

- 1 Click the **Home** or the **Projects** navigation buttons.
- 2 Select the **Create Job** option from the navigation tree. The **Create Job** screen is displayed on the **Job Details** tab.
- **3** In the **Job name** and **Job description** boxes, enter a meaningful name and job description for the new job. These both appear throughout SDL TMS.
- **4** Select the configuration you want to use. Remember that configurations are organization specific so be sure to choose the right one.
- **5** If you want to add the new job to a project create a new project, complete the **Project** box.
- **6** Under **Due Date**, click the calendar icon and select the date by which all work on the job should be finished.
- 7 Select the **Files** tab.
- 8 Either perform a drag-and-drop operation to choose the files to be translated or click inside the Choose files area, navigate to files and select them. You can upload files individually or you can upload a zip file containing several files. All files must match one of the file types listed under Types of files.
 - □ If you want to remove a file from the list of selected files, click the **x** icon preceding the file name.
- 9 If you have any reference files for the job, select these under **Reference files**.
- **10** Select the Languages & TM tab.
- 11 Under **Translate from**, select the source language of the files.
 - If only one language is available, it is automatically selected.
- **12** Under **Translate to**, select the required target languages.

- 13 If the configuration you have chosen permits you to change the default TM Sequence, the Select overriding TM sequence boxes are displayed. For more information, see Languages and TM Tab Description on page 2-10.
 - □ If you want to change your default TM sequence, choose **Select the Overriding TM sequence** and then select the required TM sequence from the list displayed in the box.
 - If you want to filter translation memories and there is more than one default TM sequence displayed, choose Select the Overriding TM sequence and then select the required TM sequence from the list displayed in the box. Filters can only be created for the translation memories in the selected sequence. For more information, see Languages and TM Tab Description on page 2-10.
 - □ If you want to assign attribute values to new translation units and there is more than one default TM sequence displayed, choose **Select the Overriding TM sequence** and then select the required TM sequence from the list displayed in the box. You can only assign attribute values for the translation memories in the selected sequence.
- 14 If you want to apply filters to translation memories, select the **TM Filter** tab.
 - □ If this tab is disabled, the configuration you have chosen does not support TM filtering. Go to step 16.
- **15** Select **Apply TM Filter**. The **Create filters** box is displayed. Create the required filters. For more information, see *TM Filter Tab Description* on page 2-12.
 - □ If there is more than one default TM sequence selected for this job and you did not select an overriding TM sequence on the Languages & TM tab, the Apply TM Filter box is disabled.
- 16 If you want to assign values to translation memory attribute fields, select the TM Attributes tab.
 - □ If this tab is disabled, the configuration you have chosen does not support assigning TM attributes. Go to step 18.
- 17 Select Assign TM attributes values to new translations and then select the attribute values to be assigned to new translations. For more information, see *TM Attributes Tab Description* on page 2-16.
 - □ If there is more than one default TM sequence selected for this job and you did not select an overriding TM sequence on the Languages & TM tab the Assign TM attributes values to new translations box is disabled.

- 18 If you want external localization vendors to perform some of the translations, select the Vendors tab.
 - If this tab is disabled, the configuration you have chosen does not support vendors. Go to step 20.
- **19** Select the required vendor(s).
- **20** If you want to refine the list of files to be used by PerfectMatch, select the **PerfectMatch** tab.
 - If this tab is disabled, the configuration you have chosen does not support PerfectMatch.
 Go to step 22.
- 21 Select Enable PerfectMatch on selected jobs only and then apply a date range to the list of jobs displayed. All jobs that were created outside the specified date range are removed from the list. From the remaining jobs, select the jobs that you want to be used by PerfectMatch. For more information, see *PerfectMatch Tab Description* on page 2-19
- 22 Select the Job Creation Summary tab.
- 23 Review your selections:
 - If you want to make a change, select the appropriate tab and make the change.
 - If you are ready to create the job, click the **Create Job** button. The files are now uploaded and the job is created.

When the files have been successfully uploaded, the following options are displayed:

- □ Create a new job using these files select this option to create a new job with the same files that you just uploaded. You can add additional files or deselect the already uploaded files as needed. This option is only available for the job that was just created.
- □ View the details page for this job select this option to view the details of the job and track the job progress for the job you just created.
- **Upload files to create a new job** select this option to create a new job with new files.

Alternatively, select another option from the navigation tree to perform a different task.



AUTHORIZING JOBS

This chapter provides an overview of authorizing jobs in SDL TMS. Sections include:

- About Authorization and PJM Authorization
- Screens Used for Authorization
- Performing Authorization

Chapter

3

ABOUT AUTHORIZATION AND PJM AUTHORIZATION

Authorization is a workflow step in which a user who has been given the role of Authorizer checks new translation requests (jobs) and decides whether the tasks they contain should be translated or not. A task is created for each target language version of each original language file submitted in the job and an authorize, reject or terminate decision is required for each one. Authorized tasks proceed immediately to the next workflow step. Rejected tasks are returned to the previous human step if there is one. Terminated tasks can still be seen as part of a job, but they are no longer available for processing.

Authorization is performed on the **Authorization** screen or the **Authorization Summary** screen. To help the Authorizer make their decisions, they can:

- □ View the files in the job.
- View translation statistics.
- View translation costs.

Where the Authorizer decides that a task should be authorized, they can also change the workflow, vendor, cost model, priority level, translator and reviewer assigned to the task.

Once a job has been authorized, invoice details are generated and the Job Invoice report can be run.

PJM Authorization

PJM (Project Manager) Authorization is a second, optional, authorization step which, is usually placed immediately after Authorization in the workflow. The PJM Authorizer has the same ability as the Authorizer to authorize, reject or terminate tasks and jobs or to assign a different workflow, cost model, priority level or user to authorized tasks.

PJM Authorization is performed on PJM versions of the **Authorization** and **Authorization Summary** screens.

Typically, the initial Authorization is performed by someone in the organization for which the job has been created (giving permission for the job to go ahead at the specified cost) and the PJM Authorization step is performed by a Vendor project manager.

About Vendors

Authorization can also be used to assign work to a vendor. A vendor is a localization service provider. They can be assigned to workflow steps within a task. Certain workflow steps can be vendor-enabled; this means that when Authorization is taking place, the project manager can choose to assign a vendor to that workflow step for individual tasks or for all tasks for a language pair. All human steps in a workflow can be vendor-enabled apart from Authorization, Recovery and Exception.

The tasks in a single job may be assigned to different vendors, however there can never be more than one vendor assigned to a single task. For example, you cannot have Vendor A assigned to the Translation step and Vendor B assigned to the Language Review step for the same task.

To assign an individual task or all tasks for a language pair to a vendor during the Authorization step, you can select the vendor and their cost model on the **Authorization**, **Authorization Summary** or **Exception** screens. When a vendor is selected, the vendor project manager is automatically assigned to the PJM Authorization step where they decide whether to accept the work or reject it. All other vendor-enabled steps in your workflow for that task or all tasks for a language pair are automatically assigned to one of the relevant vendor users that are set for the language pair. Vendors have limited access to SDL TMS and can only see information about themselves and the tasks they are performing.

If the workflow contains vendor-enabled steps, the **Authorization Summary** and **Authorization** screens display the **Vendor / Cost Model** column. This is where you can select the vendor you want to assign to tasks.

If, at **Authorization**, the authorizer simply submits the task on, the default Vendor association for those workflow steps will be applied depending on the **Workflow Step Type** set up in the Workflow Step and on the matching user set up in the Vendors Default Users.

SCREENS USED FOR AUTHORIZATION

Authorization is performed on the following screens:

- **Authorization Summary** and PJM Authorization Summary
- Authorization and PJM Authorization.

The layout and content of the PJM Authorizer version of each screen is exactly the same as the Authorizer version. Only the screen title is different.

Authorization Summary/PJM Authorization Summary Screen

The **Authorization Summary/PJM Authorization Summary** screen provides summarized task information for each language pair in a job. For each language pair it displays:

- □ The number of tasks.
- The cost of translating the tasks.
- □ Summary translation statistics for the tasks.

When you perform authorization on this screen, you select a language pair and either authorize, reject or terminate all tasks for that language pair. When you authorize tasks, you also have the ability to:

- Assign a vendor to the task
- Select an alternative workflow to process the task
- □ Select an alternative cost model for calculating invoice costs
- Give the task a special level of priority.



NOTE

Vendors, alternative workflows and alternative cost models are only available if they have been added to the Configuration used to create the job.

1	Ð	lo 📩 🤰	<u>C</u> R									
Pape		Adam.										
Job Summary			Current Jub Setting	6		Transtato	on Progress By Type	r: 732 Tuta	d Words, Langso	epr: All		1
lame	Mg Nev	i Job	Name	Wy Configuration	í.		Patry	6 Works				
tub ID	22		Description				100% IN Words	-The later	1			
Description			Project Manager					100				
Creation Date	11010	016 20 12	Class Contact									
Created By	System	Admensitator	TM Sequences	T88s 2014								
Due Date	11080	016 20 11	File Types	Test (3tudio), Mr 2007-2016 (3tu		ŧ.		1.2				
Been Caunt			Workflows	Basic Worldow	-					en son a		
Add Casts	EllerAd	é Casta	Cost Modets	My Cost Model					Unitramailate	dt. 747 villigen		
Job Cost												
Cost Variable								Comme	eet.		Cost	
OynamicJob											\$	25.0
Total Taok Cost Per I	Language	(EN-US > PL)									1	3.4
Total Taox Cost Per L	Langoage	(EN-US > RO-RO)									\$	9.4
Total Task Cost Per 1	Langeage	(EN-30 = 05-0E)									8	7.0
Total Task Cost Per I	Language	(EN+UE + FR-FR)									\$	0.03
Tidal Task Cest Per I	Langoape	(EN+US = HU)									¥	9.4
Total Task Cost Per I	Language	(EN+US + (T-(T) -									\$	7.0
											\$	74.5
Total Cast	lammary											
Total Cost				1.4034		Workflow	Cost Model	. New	Word Coast	18	sk Coun	
Authorization - S	-	File Types		Cosi		TTUT MINUTE						£
Asthorization - S			2016 (Studie), Text (Studio			Basic Worldow	My Cost Model		17	122		
Authorization - S Campange Pair		Microsoft Word 2007-	2016 (Studie), Text (Studie) 2016 (Studie), Text (Studie	5	7.97			1	17	122 122		t) I
Authorization - S Campange Pair		Microsoft Word 2007-		5 5	7.57	Basic Worldow	My Cost Model	3				
Authorization - S Language Pair Di-US - DE-DE EN-US - FR-FR EN-US - HU		Microsoft Word 2007- Microsoft Word 2007- Microsoft Word 2007-	2016 (Studio), Text (Studio	5 5 5 5	7.57 6.52 9.46	Basic Workflow Basic Workflow	My Cost Medel My Cost Model	1	07	122		
Authorization - 5 Campaoge Pair Di-US - DE-DE Di-US - FRI-FR Di-US - FRI-FR Di-US - FRI-FR		Microsoft Word 2007- Microsoft Word 2007- Microsoft Word 2007- Microsoft Word 2007-	2016 (Studio), Text (Studio 2016 (Studio), Text (Studio	5 5 5 5 5 5	7.97 6.52 9.46 7.07	Basic Worldow Basic Worldow Basic Worldow	My Cost Model My Cost Model My Cost Model	9 1 1	07 17	122 122		
Authorization - 5		Microsoft Wind 2007 - Microsoft Word 2007 - Microsoft Word 2007 - Microsoft Word 2007 - Microsoft Word 2007 -	2016 (Studie), Text (Studie 2016 (Studie), Text (Studie 2016 (Studie), Text (Studie	5 5 5 5 5 5 5 5 5 5 5	7.97 0.62 0.46 7.07 0.46	Basic Wordtow Basic Wordtow Basic Wordtow Basic Wordtow	My Cost Model My Cost Model My Cost Model My Cost Model	1 5 1 1 1 1	07 17 17	122 122 122		

Authorization Summary /PJM Authorization Summary screen example:

If vendors are available for use in this job, the **Authorization Summary** screen displays the **Vendor / Cost Model** column. This is where you can select the vendor you want to assign to all tasks for that language pair.

The Authorization Summary screen is split into four parts:

- Job Summary
- Configuration Details
- Job Cost
- Authorization Summary/PJM Authorization Summary.

Each part is described in detail below.

Field Descriptions – Job Summary

Field	Description
Name	Job name.
Description	Job description.
Creation Date	Date the job was created.
Project	If this job is part of a project, the project name appears here. Click the project name link to go to the <project name=""> - Details</project> screen.
Created By	Person who created the job.
Due Date	Date by which all work on this job should be finished.
Estimated Delivery Date	The date and time resulted after the estimated Duration for completing the job was added to the job's authorization date.
	→ NOTE
	The Duration field is only accessible on the Job Edit page. The PJM Authorizer can edit the duration only if this had already been discussed and filled in by the Authorizer at the Authorization step.
Item Count	Number of files in the job. Click this link to go the Items screen where you can see a list of the files and view the files if you want.
Job specific data	If job specific data (for example, purchase order numbers or cost codes) was added for this job, the data details are displayed here. If job data has been added for each of the target languages, click the More link to see the values for each language.
Field Descriptions – C	onfiguration Details
Field	Description
Name	The name of the configuration that was selected when the job was created. This name changes if you change it when editing the

DescriptionThe description of the configuration. This description changes if you
change it when editing the configuration.

configuration.

Project ManagerThe name of the project manager associated with the configuration. This
value changes if another name is selected when editing the configuration.

Client Contact	The name of the client contact person associated with the configuration. This value changes if another name is selected when editing the configuration.
TM Sequence	 This name is: either the name of the TM sequence set in the configuration's Default Association, if used at job creation, or the name of the TM Sequence chosen in the Select Overriding TM Sequence box at job creation, or, if the TM sequence is replaced when editing the configuration: the name of the new TM sequence used in the configuration, because this new TM sequence is the one that will be used for Update TM, or the name of the TM sequence selected in the TM Sequence Override box, because this TM Sequence remains in use for the Update TM.
File Types	The name of the file types in use in the job.
Workflows	 This name is: either the name of the workflow(s) associated with the file type(s) at job creation using the default associations, or the name of the workflow(s), if modified at the Authorization or the PjM Authorization step.
	Note : If the workflow is removed from the configuration, the live workflow remains valid for the job and therefore the name doesn't change in the job's page.
Cost Models	 This name is: either the name of the cost model(s) associated with the file type(s) at job creation using the default associations, or the name of the cost model(s), if modified at the Authorization step or the PjM Authorization step. Note: Cost Models are not visible to Vendors.

Field Descriptions – Job Cost



NOTE

If the Configuration does not contain a cost model, there will be no cost information to display.

Field	Description					
Cost Variable	Lists all variables that appear in the cost formula used to calculate job costs.					
Comment	Displays any comment that has been added for this variable.					
Cost	This is the amount the variable represents in the cost formula.					
Total Cost	Shows the total cost of translating all tasks in the job using the currently selected cost model.					

Field Descriptions – Authorization Summary/ PJM Authorization Summary

Each row of this table represents all tasks for a single language pair.

Field	Description					
	 This is the Select box. Select this to choose the tasks on this row of the table for authorization or termination. To select all tasks on this screen, select the box on the last row of the table. When you have made your selections, click the appropriate button (Authorize or Terminate) to process them. If this box is not available for selection, the task is in preprocessing and not yet ready for authorization. You do not have to deal with all of the tasks at the same time. The job will remain available to you until all tasks have been processed. 					
Language Pair	The tasks are being translated from/to the languages in this language pair. Click a language pair link to go to the Authorization screen where you can perform authorization at task level (rather than at language level).					
Cost	The cost of translating all files from this source language into this target language. If you select a different cost model, this cost will change dynamically. If alternative cost models are available, you can select one and it will be applied to all tasks. This selection is made on the last row of this table. When you select a new cost model, the translation costs are recalculated and the revised costs are displayed.					
Workflow	Shows the workflow(s) being used to process tasks. If this box contains a drop-down menu, alternative workflows are available for selection. If you select another workflow it will be applied to all tasks for this language.					

Cost ModelThe cost model used to generate task translation costs. If this
box contains a drop-down menu, alternative cost models are
available for selection. If you select another cost model, it will be
applied to all tasks for the language pair. The updated costs can
be seen immediately in the Cost column.
If the configuration for this job supports vendors, this column is

NOTE

labeled **Vendor / Cost Model** and shows the vendor and cost model that is currently assigned to the tasks in that language pair. If this box contains a drop-down menu, alternative vendors and their cost models are available for selection. If you select another vendor/cost model, it will be applied to all tasks for the language pair.

	Once a vendor/cost model is selected for the tasks in that language pair, the vendor project manager is automatically assigned to the PJM Authorization step and the vendor users that are set up for that language pair are automatically assigned to the relevant vendor- enabled steps in the workflow.
Task Count	The number of tasks for this language pair.
Word Count	Number of words in the tasks.
New	Number of new words for translation. New words are words that do not currently exist in the translation memory applied during pre-processing.
PerfectMatch	The number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files. At job level, this number is the total number of words in all tasks in the job that were translated. At task level, it is the number of words in the task that were translated.
Repetitions	Number of words in repeated segments. The first instance of a segment is ignored for this count. For example, if the same segment appears 20 times in a file, 19 of those are repetitions.
Hundred	The number of words translated with an exact translation memory match during pre-processing.
Fuzzy	The number of words translated with a fuzzy (75% to 99%)

translation memory match during pre-processing.

Priority There are three priority levels: High, Normal and Low. Tasks are normal priority by default but you can change this to high or low if you want. When a user receives a task the priority level can be seen in their inbox.

Authorization Summary/PJM Authorization Summary Screen Buttons

â	Click this to display the Edit screen where you can update job details, attach resource files to the job and assign values to any dynamic cost variables used in the cost formulas in this job.
ψ	Click this to authorize the selected tasks. The tasks are sent to the next workflow step.
×	Click this to terminate the selected tasks. The tasks are terminated immediately. No further action can take place on the tasks.
•	Click this to reject the selected tasks. The tasks are sent to the previous person in the workflow.

Authorization Screen

The Authorization/PJM Authorization screen enables you to perform authorization at task level (rather than at language level, as on the Authorization Summary/PJM Authorization Summary screen). The Authorization/PJM Authorization screen displays the individual translation tasks in the job and each one requires an authorize, reject or terminate decision.

The Authorization/PJM Authorization screen is language pair specific. This means that there is a separate Authorization/PJM Authorization screen for each language pair in the job. To switch between Authorization/PJM Authorization screens for different language pairs, use the links provided in the Language Navigation box at the bottom of the screen.

→ NOTE

If you have selected some tasks for authorization or termination on the current screen, you should process these before going to the **Authorization/PJM Authorization** screen for a different language pair.

The Authorization/PJM Authorization screen is split into four parts:

- Job Summary
- Configuration Details
- Job Cost
- Authorization/PJM Authorization.

When you perform authorization on this screen, you select a task and either authorize, reject or terminate the task. When you authorize tasks, you also have the ability to:

- Assigning a vendor to a task
- Select an alternative workflow to process the task
- □ Select an alternative cost model for calculating invoice costs
- Assign a translator or reviewer to the task
- Give them a special level of priority.



NOTE

Vendors, alternative workflows and alternative cost models are only available if they have been added to the Configuration used to create the job.

The Job Summary, Configuration Details and Job Cost parts are the same as previously described for the Authorization Summary/PJM Authorization Summary screen.

Authorization/PJM Authorization screen example:

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If vendors are available for use in this job, the **Authorization** screen displays the **Vendor / Cost Model** column. This is where you can select the vendor you want to assign a task.

Field Descriptions – Authorization/PJM Authorization (Language Pair)

Each row of this table represents a single task.

Field	Description					
	This is the Select box. Select this to choose the tasks on this row of the table for authorization or termination. To select all tasks on this screen, tick the Select box on the last row of the table. When you have made your selections, click the appropriate button (Authorize or Terminate) to process them. If this box is not available for selection, the task is in pre-processing and not ye ready for authorization. You do not have to deal with all of the tasks at the same time. The job will remain available to you until all tasks have been processed.					
Task	Number that identifies the task.					
Filename	The original file submitted for translation.					
Workflow	Shows the workflow being used to process this task. If this box contains a drop- down menu, alternative workflows are available for selection. If you select another workflow it will be applied to this task.					
Cost	Cost of translating the task.					
Cost Model	The cost model used to generate task translation costs. If this box contains a drop-down menu, alternative cost models are available for selection. If you select another cost model, it will be applied to the task and the updated cost can be seen immediately in the Cost column.					
	If the configuration for this job supports vendors, this column is labelled Vendor / Cost Model and shows the vendor and cost model that is currently assigned to the task. If this box contains a drop-down menu, alternative vendors and their cost models are available for selection.					
	NOTE					
	Once a vendor/cost model is selected for the task, the vendor project manager is automatically assigned to the PJM Authorization step and the vendor users that are set up for that language pair are automatically assigned to the relevant vendor-enabled steps in the task's workflow.					

Word Count Number of words in the task.

PerfectMatch	The number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files. At job level, this number is the total number of words in all tasks in the job that were translated. At task level, it is the number of words in the task that were translated.
New	Number of new words for translation. New words are words that do not currently exist in the translation memory.
Hundred	The number of words translated with an exact translation memory match during pre-processing.
Repetitions	Number of words in repeated segments. The first instance of a segment is ignored for this count. For example, if the same segment appears 20 times in a file, 19 of those are repetitions.
Fuzzy	The number of words translated with a fuzzy (75% to 99%) translation memory match during pre-processing.
Priority	There are three priority levels: High, Normal and Low. Tasks are normal priority by default but you can change this to high or low if you want. When a user receives a task the priority level can be seen in their inbox.
Folder	If the job was created automatically by SDL Nexus, the local address of the file sent for translation is shown here.
Language Navigation	To display the Authorization screen for a different language pair, select the language pair here. Before you select another language pair, process any selections you have made on the current screen. For example, authorize any tasks you have selected for translation.
Translator	The user/group assigned to the first Translation step. To reassign this workflow step to another user, select an alternative selection from the drop-down list.
Reviewer	The name of the user/group assigned to the first Review step. To reassign this workflow step to another user, select the required user from the drop-down list.
	If there is more than one review step in the workflow, only the first one is affected by the change of user. All later review steps remain assigned to the default user.

Authorization/PJM Authorization Screen Buttons

ŝ	Click this to display the Edit screen where you can update job details, attach resource files to the job and assign values to any dynamic cost variables used in the cost formulas in this job.
•	Click this to authorize the selected tasks. The tasks are sent to the next workflow step.
×	Click this to terminate the selected tasks. The tasks are terminated immediately. No further action can take place on the tasks.
•	Click this to reject the selected tasks. The tasks are sent to the previous person in the workflow.

PERFORMING AUTHORIZATION

Before you start, make sure that you have read the descriptions of the **Authorization Summary/PJM Authorization Summary** and the **Authorization/PJM Authorization** screens earlier in this chapter.

Selecting Jobs for Authorization

You can select jobs to authorize from the Inbox or My Jobs screens.

Selecting Jobs for Authorization from your SDL TMS Inbox

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the Inbox option from the navigation tree. The Inbox View screen is displayed. Jobs waiting to be authorized are at the Authorization or PJM Authorization workflow step.
- **3** Open the job on the required authorization screen:
 - □ If you want to open the job on the Authorization Summary/PJM Authorization Summary screen, click the Authorization Summary icon in the Workflow Step column.
 - □ If you want to open the job on the Authorization/PJM Authorization screen, click the Authorization icon in the Workflow step column.

Authorization jobs remain in your inbox until all tasks in the job have either been authorized, rejected or terminated.

Selecting Jobs for Authorization from the My Jobs Screen

Click the Authorization Summary icon.

🔞 My Jobs							
Back G Info							
Page							
Jobs For Authorization							
% 🚺 Job Name	Due Date						
😗 🚺 🕨 Sample job	08/26/2016 14:31						
😗 🚺 🕨 Demo Three	01/29/2016 15:20						
😗 🚺 🕩 Song 2	01/29/2016 18:00						
Authorization S	Summary icon						

Performing Authorization (at Language Level) on the Authorization Summary/PJM Authorization Summary Screen

- 1 If you want to see the source language files submitted for translation in this job:
 - □ Click the **Item Count** link in the **Job Summary** part of the screen. The **Item** screen is displayed. Click a file name link to view the file. Click the **Back** button when you have finished.
- 2 Check the translation statistics and cost for the first language pair:
 - □ If alternative cost models are available, you can select each one and check the effect on the translation cost. The final cost model selection will be used to generate invoice amounts when the tasks are authorized.
- **3** If your configuration for this job supports vendors, check the vendor and cost model for the first language pair:
 - □ If alternative vendors and cost models are available, you can select one. The selected vendor will be assigned to the PJM Authorization step and any other vendor-enabled steps for that language pair.
- 4 Check the default workflow:
 - □ If alternative workflows are available and you want to select one, click the down arrow in the **Workflow** column and select it from the list displayed. All tasks for this language pair will be processed using the selected workflow.
- **5** Check the priority level:

- □ If you want to assign a special level of priority to all tasks for this language pair, click the down arrow in the **Priority** column and select the level from the drop-down list.
- 6 If you want to see the individual tasks for the language pair, click the link in the Language Pair column. The Authorization screen for the selected language pair is displayed. You can perform authorization here. Click the Back button to return to the Authorization Summary screen.
- 7 Authorize, reject or terminate the tasks for this language pair:
 - □ If you want the tasks for this language pair to be translated, select the language pair (tick the **Select** box) and click the **Authorize** button. An information message is displayed confirming which tasks has been authorized. Click the **Info** button to clear the message from the screen.
 - If do not want to translate tasks for this language pair, select the language pair (tick the Select box) and click the Reject button. An information box is displayed. Enter a description to indicate why you are rejecting the tasks for this language pair and click Submit. An information message is displayed confirming which tasks have been rejected. Click the Info button to clear the message from the screen.
 - □ If you want to terminate the tasks for this language pair, select the language pair (tick the **Select** box) and click the **Terminate** button. An information message is displayed confirming that the tasks has been terminated. Click the **Info** button to clear the message from the screen.
- 8 Repeat steps 2 6 for each language pair.
- **9** If you want to process all languages at the same time, tick the **Select** box on the last row of the table and then click either the **Authorize** or the **Terminate** button.
- **10** If you want to update the **Job Summary** details or attach reference files to the job or specify cost variable amounts, click the **Edit** button. The **Edit** screen is displayed.

> NOTE

Some organizations use Dynamic cost variables in their job cost formulas. A value is assigned to such variables during Authorization.

- 11 Make the required change(s) and click **Submit**. Click the **Back** button to return to the **Authorization Summary** screen.
- 12 If you want to delete the job, click the **Edit** button. The **Edit** screen is displayed. Click the **Deactivate Job** button. Confirm that you want to deactivate the job and then click the **Delete** button.
- **13** Select a menu option to exit this screen when you have finished.

Performing Authorization (at Task Level) on the Authorization/PJM Authorization Screen

- 1 If you want to see the source language files submitted for translation in this job:
 - □ Click the **Item Count** link in the **Job Summary** part of the screen. The **Item** screen is displayed. Click a file name link to view the file. Click the **Back** button when you have finished.
- 2 Check the translation statistics and cost for the first task:
 - □ If alternative cost models are available, you can select each one and check the effect on the translation cost. The final cost model selection will be used to generate invoice amounts when the task is authorized.
- **3** If your configuration for the job includes vendors, check the vendor and cost model for the first task:
 - □ If alternative vendors and cost models are available, you can select one. The selected vendor will be assigned to the PJM Authorization step and any other vendor-enabled steps for that task.
- 4 Check the default workflow:
 - □ If alternative workflows are available and you want to select one, click the down arrow in the **Workflow** column and select it from the list displayed.
- **5** Check the priority level:
 - □ If you want to assign a special level of priority to this task, click the down arrow in the **Priority** column and select the level from the drop-down list.
- **6** Check the user assignments:
 - □ If you want to change the user assigned to the first Translation step for this task, click the down arrow in the **Translator** box and select a different user.
 - □ If you want to change the user assigned to the first Review step for this task, click the down arrow in the **Reviewer** box and select a different reviewer.
- 7 Authorize, reject or terminate the task:
 - If you want the task to be translated, select the task (tick the Select box) and click the Authorize button. An information message is displayed confirming that the task has been authorized. Click the Info button to clear the message from the screen.

- If you do not want to translate this task, select the task (tick the Select box) and click the Reject button. An information box is displayed. Enter a description to indicate why you are rejecting the task and click Submit. An information message is displayed confirming that the task has been rejected. Click the Info button to clear the message from the screen.
- □ If you want to terminate the task, select the task (tick the **Select** box) and click the **Terminate** button. An information message is displayed confirming that the task has been terminated. Click the **Info** button to clear the message from the screen.
- 8 You can also authorize or terminate several tasks at the same time:
 - Select the tasks to be processed (to select all tasks for this language pair, tick the Select box on the last row of this table) and click the Authorize or Terminate button. An information message is displayed confirming which tasks have been authorized/terminated. Click the Info button to clear the message from the screen.
- **9** When you have finished working on the current language pair, click the down arrow in the **Language Navigation** box and select another language pair.
- **10** Repeat steps 2 6 for each language pair in the job.
- **11** If you want to update the **Job Summary** details or attach reference files to the job or specify cost variable amounts, click the **Edit** button.

NOTE

Some organizations use Dynamic cost variables in their job cost formulas. A value is assigned to such variables during Authorization.

- **12** Make the required change(s), click **Submit** and then click the **Back** button to return to the **Authorization** screen.
- 13 If you want to delete the job, click the Edit button. The Edit screen is displayed. Click the Deactivate Job button. Confirm that you want to deactivate the job and then click the Delete button.
- 14 Select a menu option to exit this screen when you have finished.

TRANSLATING AND REVIEWING

This chapter provides an overview of translating and reviewing in SDL TMS. Sections include:

- About Translating and Reviewing
- Selecting Tasks from your SDL TMS Inbox
- Working with Tasks Assigned to Groups
- Downloading and Uploading Tasks
- Downloading Translation Memories
- Submitting/Rejecting Tasks to/from your Inbox
- About the Translation Interface
- Translating in the Translation Interface
- Working with Rejected Tasks

Chapter

ABOUT TRANSLATING AND REVIEWING

Translation and translation review can be performed online in SDL TMS or you can download tasks for translation or review offline.

Starting with TMS II.3 translators and reviewers can connect to their TMS server from within SDL Trados Studio and work in their inbox in the same way as when they are logged in to SDL TMS. This functionality is provided by the **Commute** plug-in available in the **My Downloads** screen. For details, read more in the *SDL TMS - Using SDL Trados Studio with SDL TMS* quick start guide, available in the **My Downloads** screen.

You can also send your jobs/tasks for translation and/or review in GroupShare using the **GroupShare Inbox** feature - for more information, see the *SDL TMS* - *GroupShare Integration Quick Start Guide*, available in the **My Downloads** screen.

To work online, use the Translation Interface, which is built into TMS.

If you choose to work offline, depending on the filter used to prepare the bilingual file, the files may be either ITD or SDLXLIFF format. Optionally, and regardless of the format, you can download a Studio Package. Both package formats are compatible with all Studio 2014 and earlier. The native Studio package is the preferred download option if you are translating in Studio.

In addition to the translation task, you can also download copies of the following:

- Any reference material available for the task.
- The original file sent for translation.
- Translation memories.

After you have finished working on a task, submit it to the next workflow step. You can submit tasks from your SDL TMS inbox and from the Translation Interface. Tasks completed offline must be uploaded to SDL TMS and submitted to the next step.

Reviewing Tasks

Reviewers can review tasks online in the Translation Interface (where they have access to the same edit functionality as translators) or download tasks for review offline in SDLX or SDL Trados Studio. Reviewed tasks are either accepted or rejected. Accepted tasks are submitted to the next workflow step. Rejected tasks are returned to the previous workflow step for correction. When you reject a task, you must add a comment explaining why you are rejecting it.

Before submitting a reviewed translation to the next step, you can give the translation a quality rating.

QA Checks

QA Checks are automated review steps which are performed on completed translations immediately after translation. There are three automated QA checks:

Segment not translated	This check looks for segments where the source and target segment text are identical.
Segment not confirmed	This check looks for segments that have not been confirmed and are not 100% translation memory match segments. A segment is confirmed when you press the Enter key to exit the segment.
Terminology not used	This check looks for segments that contain a term for which a translation exists in the terminology database but the translation has not been used.

> NOTE

If you do not have a workflow step that includes these QA checks, you can also choose to run them from the **Translation** page. For more information, see Run QA Checks on page 4-35.

Each type of QA check is performed separately, one after the other. If a task fails a check, it is rejected back to the translator for corrective action. A comment explaining why the task failed the check is added to the task. Depending on the type of QA check, the task comment may contain a list of the segments that failed the check or a segment level comment may be added to each failed segment.

When you receive a task that failed a QA check, you must read the task comment to find out why the task failed and then correct the segments in error and submit the task again. This time the task should successfully complete the QA check and move on to the next QA check (if there is one) or to a 'human' review step.

If segments cannot be corrected in line with the requirements of the QA check, you can use the **QA Check Override** function to skip the check. For example, if a segment fails a QA check because it appears not to have been translated, but the segment does not require translation because it contains a logo or an address line, you can override the check before submitting the task again. When you override a QA check, the check is skipped completely for the task.

QA Check Failed reports give details of tasks that failed QA checks. Where a check is overridden, the report includes the reason given for the override.



NOTE

QA Checks are optional and may not be performed at your site.

SELECTING TASKS FROM YOUR SDL TMS INBOX

All new work is placed in your SDL TMS inbox. The **Inbox View** lists all jobs that contain tasks assigned to you or to a Group of which you are a member. The tasks themselves can be seen on the **Inbox View (Tasks)**. The **Inbox View (Tasks)** displays the tasks contained in a single job for a single language pair. When you want to open a task in SDL TMS for translation or review, you select the task from the **Inbox View (Tasks)**.

Inbox View example:

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	Inbox View									
2	Organization	Proje	ct Jo	6 4	Task Count	Workflow Step	Language Pair	New	Word Count	Tasks Assigned
	Dehip Grgal +					Authorization •	All •			
8	Demo Organization	Song	2 De	mo Three	1.68	Authorization	EN-GB > PT	209	258	18
0	Demo Organization		Sa	mple 1	1 ljb	Authorization	EN-GB > PT	0	0	
6	Demo Organization		54	mple job 2	τiβ	Authorization	RO = EN-GB	0	0	
13					20	1		1,711	2,802	

The Inbox View screen is displayed when you click the Home navigation button and select Inbox from the navigation tree. To display the Inbox View (Tasks), click a link in the Task Count column of the Inbox View.

Inbox View (Tasks) example:

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Baci	Refres	h	B	Submit	Reject	Download U	pload	Take Ownership	Reassign To Group	Reassig	n To	GroupSha	re		-
	Page			Ac	tions	Files			Tasks			GroupSha	re		
	Inbox Viev	v (Ta	isks)												
•	Status	÷	R	Filename		Due Date	Task	Comment	Workflow S	Step 🔺	Lan	guage Pair	New	Word Count	Users Assig
									Translation	n v	EN	-US > ES	Ψ		All
				R Preface.	bd.	02/04/2016 14:53	4	4	Translation		ENH	US > ES	64	64	John Doe
	: 😁			R Translat	ion Demo.b	02/04/2016	4	5	Translation		ENH	US > ES	45	5 99	Sam Smith
													109	163	

The name in the Filename column is the name of a source language file sent for translation:

- **To preview a task, click the Preview** icon that precedes the file name.
- **T**o open a task on the Translation Interface for translation or review, click the **Filename** link.

For a complete description of all columns and buttons that appear in your SDL TMS inbox, see Working with your SDL TMS Inbox on page 1-26.

Selecting Tasks for Translation or Review

- 1 If you are in the **Inbox View**, click a link in the **Task Count** column. The **Inbox View (Tasks)** screen is displayed. It lists all of the tasks in the selected job.
- 2 If you want to preview a task, click the **Preview** icon in the **Filename** box.
- **3** Click the file name link in the **Filename** box to open the task in the **Translation Interface**.

WORKING WITH TASKS ASSIGNED TO GROUPS

Tasks that appear in your inbox may be assigned to you personally or to a group of which you are a member. When tasks are assigned to a group, the task details are placed in the inbox of every member of the group. Group members can examine tasks and then take ownership of tasks. Once a group member has taken ownership of a task, no-one else in the group can access it. (It remains in the inbox of other group members but it is 'grayed-out'.) Once you have taken ownership of a group task, you can reassign it back to the group or to another user if necessary.

How can I tell if a task is assigned to a Group?

In the **Inbox View** of your SDL TMS inbox, if this icon **a** appears in the **Tasks Assigned** column, tasks in this job have been assigned to a group. The number preceding the icon tells you how many tasks are currently assigned to the group. As group members take ownership of the tasks, other versions of the icon also appear:

-	ohn Doe Revert + Int	юх									001
Bee	Refresh	Submit Reject	Download Upload	Jake Outership	Reassign To I	Reassign To User	GroupShare				
	Page	Actions	Files		Jobs		GroupShare				
	Inbox View										
	Organization	Project	Job	^	Task Count	Workflow	Step	Language Pair	New	Word Count	Tasks Assigned
	Demo Organization					Translatio	n •	AI T			
8	Demo Organization		A Job		1 lß	Translation	1	R0 > FR	4	4	
	Demo Organization		Concordance search s	creenshots	1 ljb	Translation	1	R0 ≥ FR	0	32	18
	Demo Organization	Introduction	Introduction		1 ljb	Translation	1	EN-US > EL	64	64	18
	Demo Organization		Multiple Tasks 2		2 🖗	Translation	1	EN+US > ES	109	163	12 12
	Demo Organization		PM cand 5		1 ljb	Translation	1	EN-GB > PT	245	245	
	Demo Organization		Reference Example	p	1 ljb	Translation	1	EN-US > IT	56	107	18
	Demo Organization		Retrieve PM candidate	is 3	1 ljb	Translation	1	EN-GB > PT	0	245	
	Demo Organization		Sample job 2		1 🖗	Translation	1	RQ > FR	219	277	18
	Demo Organization		Sample job 3		1 B	Translation	1	R0 > FR	219	277	18
Θ					20				1,711	2,802	

The red icon indicates tasks owned by other members of the group and the blue icon indicates tasks owned by you. In the above example the second job contains 2 tasks:

- One task is still assigned to the group.
- One task has been taken by you
- Isotropy of the task corresponding to the third job.

In the **Inbox View (Tasks)**, *Unassigned* appears in the **Users Assigned** column for each task currently assigned to a group. You need to take ownership of group tasks before you start to work on them.

How can I view tasks assigned to a Group?

In the **Inbox View**, click a link in the **Task Count** column to display the tasks in the **Inbox View (Tasks**). To preview a task, click the **Preview** icon in the **Filename** column. You can also open a task on the **Translation Interface** and view the segments in more detail.

How do I take ownership of tasks assigned to a Group?

- □ If you want to take ownership of all tasks currently assigned to a group, display the job containing the tasks in the **Inbox View**, tick the **Select** box for the job and then click the **Take Ownership** button.
- □ If you want to take ownership of selected tasks, display the job containing the tasks in the **Inbox View (Tasks)**, tick the **Select** box for each task and then click the **Take Ownership** button.

In the Inbox View (Tasks), your name appears in the Users Assigned column for each task you own.

How do I reassign tasks back to the Group or to another User?

If you have taken ownership of a task but now you need to give it back to the group or give it to another user before it is completed, you can reassign the task.

To reassign a task:

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 1 Select the **Inbox** option from the navigation tree. The **Inbox View** screen is displayed.
- 2 Locate the job containing the task(s) to be reassigned and click the icon in the **Task Count** column. The **Inbox View (Tasks)** is displayed.
- **3** Select the task or tasks to be reassigned.
- 4 Click **Reassign to Group** to return the task to the group. A confirmation dialog is displayed. Click **Yes**.
- 5 Click **Reassign to User** to assign the task to a particular user. The **Inbox View (Tasks)** screen changes to display just the selected tasks.
 - In the Users Assigned column, select the user you want to assign the task to from the dropdown list. Continue until you have selected a user for every task on the screen and click Submit.
 - A confirmation dialog is displayed. Click **Yes**.

Alternatively, to reassign a task:

- **1** Display your **Inbox**.
- 2 Locate the job containing the task or tasks to be reassigned.
- **3** Select each task to be reassigned:

- If you want to return the tasks to the group, click **Reassign to Group**. A confirmation dialog is displayed. Click **Yes**. The tasks are now all reassigned.

- If you want to assign tasks to a particular member of the group, click **Reassign to User**. For the first task is the list, in the **Users Assigned** column, select the user you are reassigning the task to. Repeat the procedure for every task in the list. When you have finished reassigning the tasks, click **Submit**. A confirmation dialog is displayed. Click **Yes**. The tasks are now reassigned to the selected users.

DOWNLOADING AND UPLOADING TASKS

You can download tasks from SDL TMS for translation or review in SDLX or SDL Trados. When you have completed the translation or review you must upload the tasks to SDL TMS and submit them to the next workflow step as usual. When downloading tasks, you can also download any reference material held for the task, a copy of the original file sent for translation and, if you have the necessary permissions, translation memories.

When you download a task, the original task is retained in SDL TMS and a copy is created for downloading. When you upload a completed task, it immediately replaces the version of the task held in SDL TMS and may be submitted to the next workflow step. When downloading:

- □ You can download several tasks at the same time.
- □ You can download the same task more than once.
- The original task remains in your inbox where it is available for selection. This means that it can be opened and edited in SDL TMS and it can also be submitted to the next workflow step. Once the task in your inbox has been submitted to the next step, you can no longer upload the downloaded version of the task.
- If you downloaded the task for review and have not made any changes to the translation or added any comments, there is no need to upload the downloaded task, you can simply submit the original from your inbox.
- Details of every download you make are stored on the **My Downloads** screen. The details include the zip file itself and you can download the . zip file from here. Download details remain on this screen until you delete them.



NOTE

You must not rename downloaded tasks or they will not be recognized by SDL TMS when you try to upload them again.

Download Options

When you opt to download tasks, an information message is displayed. It lists the available download options:

ITD	Select this to download the tasks as SDLX ITD files.
SDLXLIFF	Select this to download the tasks as SDLXLIFF files.
Studio Package	Select this to download the tasks in a .sdlppx package.
Source File	Select this to download copies of the original language files submitted for translation.
Reference Material	Select this to download any reference material that has been uploaded for the jobs. Alternatively, click the Reference Material icon to download the reference material files from this job.
Target File	Engineers can download the target file from the Translation Interface.

Make your selections and click the **Download** button. The selected files are zipped into a single file for downloading.



NOTE

These options may vary depending on your permission rights.

Downloading Tasks from your SDL TMS Inbox

- **1** Select the tasks to be downloaded:
 - □ If you want to download all of the tasks in a job, tick the **Select** box for the job on the **Inbox View** screen.
 - □ If you want to select individual tasks from a job, click a link in the **Task Count** column on the **Inbox View**. The tasks in the selected job are displayed on the **Inbox View (Tasks)** screen. Tick the **Select** box of each task to be downloaded.
- 2 Click the **Download** button. An information message listing items available for downloading is displayed.
- 3 Select the items to be downloaded and click the **Download** button.

- □ If the process of zipping the files is taking a long time, you can work on something else until the .zip file is ready. See the note below.
- 4 When the zip file is ready for downloading, a new information message is displayed.

The zip file has been created successfully. Click the link to download it. Presentation 1-28-2016 14-13-52 zij

- 5 Click the filename link in the information message to download the zip file:
 - If you are using Microsoft Internet Explorer, the File Download dialog box is displayed. Click Save to display the Save As dialog box. Navigate to the folder where you want the . zip file to be placed and click Save. The download now takes place.
 - □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.
- 6 Click the Info button to close the information message containing the download link.

> NOTE

If the selected files are taking a long time to zip, you can exit this screen without cancelling the zip process and then download the . zip file later from the **My Downloads** screen.

Downloading Tasks from SDL Trados Studio

You can perform the task download directly in Trados Studio, after installing the **Commute** plug-in available in TMS in the **My Downloads** screen. For details, read more in the *Using SDL Trados Studio with SDL TMS* quick start guide, available also in the **My Downloads** screen.

Downloading from the My Downloads Screen

This screen lists ZIP files that have been created but which were not downloaded immediately when they were created. For example, if you run a report and leave the report generation screen before the report ZIP file is ready, the ZIP file will be added to this screen. You can download the ZIP files that appear here as many times as you want. When you have finished with a zip file you must delete it from this screen as it will not be deleted automatically by SDL TMS.

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the My Downloads option from the navigation tree. The My Downloads screen is displayed. The My Downloads table contains a list of *.zip* files available to be downloaded.
- 3 Click the Filename link to download the file:

- □ If you are using Microsoft Internet Explorer, the **File Download** dialog box is displayed. Click **Save** to display the **Save As** dialog box. Navigate to the folder where you want the . zip file to be placed and click **Save**. The download now takes place.
- □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.

The System Downloads section contains a list of tools available for you to download. The Documentation section lists the material that can be accessed on the SDL Documentation Center. You cannot delete these files.

Deleting Entries from the My Downloads Screen

1 Select ^I each file to be deleted.

If you want to delete all files, tick the **Select All** check box.

- 2 Click **Delete**. A confirmation dialog box is displayed.
- 3 Click Yes. When the file has been deleted, a message confirming the deletion is displayed.
- 4 Click the Info button to clear the message from the screen.

Uploading Completed Tasks and Submitting them to the Next Step

Tasks that are downloaded to your PC must be uploaded again to SDL TMS when you have completed them. Once they have been uploaded, they must either be submitted to the next workflow step or, in the case of a reviewed task, rejected.

Uploading and Submitting from SDL Trados Studio

You can perform the task upload and submit directly from Trados Studio, after installing the **Commute** plug-in available in TMS in the **My Downloads** screen. For details, read more in the *Using SDL Trados Studio with SDL TMS* quick start guide, available also in the **My Downloads** screen.

Uploading and Submitting In SDL TMS

You can upload tasks or you can select and upload a .zip file containing several tasks. When you upload a task, it immediately replaces the original task in your inbox and is ready for submitting to the next step.

Any supporting documents and files that were downloaded with tasks are not uploaded.

Uploading Tasks

- 1 Click the Home navigation button. The Home navigation tree is displayed.
- 2 From the navigation tree, click Inbox. The Inbox View screen is displayed.
- 3 On the ribbon, click Upload and then Task Upload. The Task Upload screen is displayed.

- □ If you are uploading a file that has been converted offline click **Convert Upload**. If the file is an 'Item' (an original file which required conversion before it could be translated in SDL TMS), only one converted version of the file needs to be uploaded irrespective of the number of languages the file will be translated into. If you downloaded a completed translation for conversion to its original file format, each translated file must be converted and uploaded individually.
- 4 Navigate to the folder containing the file to be uploaded, select it and then drag and drop it into the drop zone

🚯 Johr	n Doe 🕨 li	nbox 🕨 Ta	ask Upload			0	Ō	1	
Back	P Refresh	B Info	Start Upload	Return To Inbox					
	Page		Action	Inbox					
Upload	Tasks								
1									
	Drop files here or click to select.								
×c	X C01_STUDIOPACKAGE_10-27-2016_17-18-6.zlp 0.6 KB 0								
🕅 Au	Automatically submit bilingual files when successfully uploaded.								
III Fai	led And Le	ngthy imp	oorts						
There a	are no reco	ords to dis	play.						

5 Continue adding files until all files for uploading are listed.

If you want to remove a file from the list, click the icon preceding the file name.

- **6** Select **Automatically submit bilingual files when successfully uploaded** if you want the uploaded tasks to be submitted to the next workflow step as soon as the upload is complete.
- 7 Click Start Upload. The task upload begins; you can monitor the progress of the upload in the fields that are now displayed at the top of the Task Upload screen. The speed of the upload is dependent on your Internet connection and on the level of traffic currently connecting to SDL TMS.
- 8 When the upload is complete, the following tables are displayed in the Task Upload screen: Just Uploaded Report and Failed and Lengthy Imports. The tables indicate which files were uploaded successfully and which ones failed.

Processing Uploaded Tasks

Uploading tasks is a two part process. In part one, the file is uploaded to SDL TMS and SDL TMS confirms that the uploaded file matches a task that you own which is currently in your inbox. In part two, the uploaded file is processed by SDL TMS.

When a file is processed, the contents of the file (the translated segments) are added to the database in SDL TMS. Depending on the size of the uploaded file this could take some time. You can see the processing status of an uploaded task in the **Just Uploaded Report** table of the **Task Upload** screen.

Task	Filename	Upload Status
60	/TASK60_RO- FR_SourceforScreenshots_txt.sdlxliff	The SDLXLIFF has uploaded successfully and will be processed shortly.

Before a task can be submitted to the next step, both parts of the upload must have been completed.

Submit Uploaded Tasks Manually

If you did not choose to automatically submit tasks to the next workflow step when the upload was complete, you will have to submit them manually. You do this from the **Inbox View (Tasks)**. Tasks that have been uploaded successfully and which are now ready to submit to the next step have a double green arrow beside the icon that identifies the current step:

To submit a task from your inbox, select the task and click **Submit**. Tasks for which the upload failed or is not yet completed, cannot be submitted to the next step.

Handling Upload Failures

If an upload fails, an entry appears in the **Failed And Lengthy Imports** part of the **Task Upload** screen. Failed uploads are displayed in red. These are the most common reasons for upload failures:

- □ You are trying to upload a task that does not belong to you. You cannot upload tasks that are currently assigned to a group or to another user.
- You are trying to upload a task that is not currently in your inbox. You can only upload tasks that are currently in your inbox. If a task is no longer in your inbox, it may have been assigned to someone else or it could have been terminated.
- The name of the ITD being uploaded, has changed. If a task's name was changed outside SDL TMS, then SDL TMS will not be able to match it to a task in your inbox when you upload it again.

□ The upload 'timed out'. This means that the upload was taking such a long time that it exceeded the maximum time allowed for a single upload. The problem may have been due to network issues at the time. If the file was a single large ZIP file, you could try uploading it again or you could break it down into a number of smaller ZIP files for uploading.

To establish why the upload failed:

- 1 Click the task number link in the **Task** column of the **Failed And Lengthy Imports** table. The **Task History** screen is displayed.
- 2 Click the down arrow in the filter box at the top of the **User** column and select **All**. All workflow steps, human and system, are now displayed for the task.
- **3** Locate the failed file-upload step (it is displayed in red). The reason for the upload failure is displayed in the **Description** column.

When you know why the upload failed, correct the problem and try again to upload the file. If you cannot resolve the problem yourself, contact your SDL TMS administrator. The task will stay in your inbox until it has either been submitted to the next step or terminated.

Checking the Upload/Download Status of your Tasks

In the **Inbox View (Tasks)**, you can tell at a glance which tasks have been downloaded, which have been uploaded and which uploads have failed:

- This task has been downloaded.
- ² This task has been uploaded successfully.
- The upload for this task failed.
- The upload is still in progress.

DOWNLOADING TRANSLATION MEMORIES

If you have the necessary permissions, you can download SDL TMS translation memories for use in SDLX or SDL Trados. Translation memory files are compressed into a .zip file for downloading.

Exporting Translation Memories (TMs)

When you download a translation memory, you are actually downloading a file containing a copy of the contents of the translation memory for a single language pair. The process of creating the download files is called exporting a TM. TM exports are performed automatically by SDL TMS. However, the schedule that defines when the exports take place is managed by the SDL TMS system administrator.

Screens used for TM Downloading

You can download translation memories from the **Exported TMs** screen or from the **Download Files** screen:

- □ When you download from the **Exported TMs** screen, you can download all translation memories for all jobs you currently have in your inbox.
- □ When you download from the **Download Files** screen, you can download translation memories for a single job.

Exported TMs screen example:

👺 Inbox 🕨 Export	ed TMs					0	۰	1
Back Refresh	Downlos	id						
Page	Action							
III TMs								
Select All	Clear Selection		Search			1		
Filename	÷	File Size		Exported D	ate			
Main TM_SQ_	EN-GB.mdb.zip	28.25 KB		08/22/2016	12:09:26			
Main TM_SQ_	EN-GB.sdltm.zip	26.03 KB	26.03 KB 08/22/2016 12:09:29					
Main TM_SQ_	EN-GB.tmx.zip	3.58 KB		08/22/2016	12:09:29			
Showing 1 to 3 of 3	entries					1		

The **Exported TMs** screen is displayed when you click the **Download TMs** button in the **Inbox View**.

Note the search box and the buttons at the top right of the screen.

Below is an example of the **Download Files** screen. Translation memory data export files appear in the **TMs** section of the screen:

• ا	Vasile Org + Jobs + Jobulica 3 + Download Files								
Bac	x Refresh Info	Download Submit							
	Page Actions								
⊞	Reference Material								
The	There are no records to display.								
	III Translated Files								
The	There are no records to display.								
	III III III III III III III III III II								
	Language Pair		^	Word Co	ount		Task Count		
	EN-US > DE		V.						
	EN-US > DE					41			
-	SOLXLIFFs								
	re are no records to dis	play.							
	TTXs								
	re are no records to dis	play.							
	Source Files								
	Folder	Filename		Source	Language		Word Count		
	1 court	dontietit.bt	-		(United States)		Trong Count		
_					(
_	TMs				File File	Frend	ad Bata		
	Filename	a dh al a		*	File Size		led Date		
H	Main TM_SQ_EN-GB.r Main TM_SQ_EN-GB.s				28.25 KB 26.03 KB		2016 12:09:26 2016 12:09:29		
H	Main TM_SQ_EN-GB.t				3.58 KB		2016 12:09:29		
					57.86 KB	- Officer			
-									

The **Download Files** screen is displayed when you click the **Download** button on the **<Job name>** - **Details** screen. The **Download Files** screen contains a number of download options; translation memories appear at the bottom of the screen, in the **TMs** table. Both the **Download Files** screen and the **Exported TMs** screen contain the **TMs** table.. The following fields that appear in the **TMs** table.

Field	Description
	Select this box to select the TM for downloading.
Filename	There are three parts to a file name: the translation memory name, the language pair, the export file type (.sdltm, .mdb, .sdltm).
File Size	Size of the export file.
Exported Date	The date that this file was created. This is when the TM was exported to a file.

Downloading TMs from the Exported TMs Screen

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the **Inbox** option from the navigation tree. The **Inbox View** is displayed.
- 3 Click the **Download TMs** button. The **Exported TMs** screen is displayed.
- **4** Tick the **Select** box of each translation memory file to be downloaded. Make sure you select the correct language pair and file format.
- 5 Click the **Download** button. The selected files are compressed into a single .zip file for downloading.



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NOTE

If the selected files are taking a long time to zip, you can exit this screen without cancelling the zip process and then download the .zip file later from the **My Downloads** screen.

Downloading TMs from the Download Files Screen

- 1 Click the Projects navigation button. The Projects navigation tree is displayed.
- 2 Check the currently selected organization for which you want to download a TM and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon **b** that precedes the organization to which the job belongs.
- 4 Select the **Jobs** option. The **Jobs** screen is displayed. It lists all current jobs for the selected organization.
- 5 Select the job for which you want to download the translation memories (click the job name in the Name column). The job is displayed on the <Job name> Details screen.
- 6 Click the **Download** button. The **Download Files** screen is displayed.
- 7 Tick the **Select** box of each translation memory file to be downloaded. Make sure you select the correct language pair and file format.
- 8 Click the Download button. The selected files are compressed into a single .zip file for downloading.

NOTE

If the selected files are taking a long time to zip, you can exit this screen without cancelling the zip process and then download the .zip file later from the **My Downloads** screen.

SUBMITTING/REJECTING TASKS TO/FROM YOUR INBOX

Completed translations can be submitted to the next workflow step from your SDL TMS inbox or from the **Translation Interface**. If you want to reject a task, this can also be done from either your SDL TMS inbox or the **Translation Interface**. You can only submit or reject multiple tasks at the same time from your SDL TMS inbox.

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the Inbox option from the navigation tree. The Inbox View screen is displayed.
- **3** Select the tasks to be submitted or rejected:
 - If you want to submit or reject all tasks for a single job, tick the **Select** box for the job.
 - □ If you want to select individual tasks to submit or reject, click a link in the **Tasks Assigned** column for the job containing the tasks, the **Inbox View (Tasks)** is displayed. Tick the **Select** box for each task to be submitted or rejected.
- 4 If you want to submit the selected tasks to the next workflow step, click the **Submit** button. An information message is displayed. It asks you to confirm that you want to submit the selected tasks. Click **Yes**.
- 5 If you want to return the tasks back to the previous workflow step, click **Reject**. A comment box is displayed. Add a comment explaining why the tasks have been rejected and click **Submit**.

ABOUT THE TRANSLATION INTERFACE

The **Translation Interface** is the editor that is built into TMS. Use it to translate or review tasks in SDL TMS.

Once a task has been completed it can be submitted to the next step from here. A task can also be rejected from here. Rejection returns the task to the previous step. To open a task on the **Translation Interface**, click a link in the **Filename** column of the **Inbox View (Tasks)**. Source segments are displayed on the left and the corresponding target language segments are displayed on the right. A source/target segment pair is known as a translation unit.

🚯 Arti	hur Smith	Revert	Inbox I	Demo O	rganizati	on 🕨 Sar	npk	e Job (Aut	horization	EN-US > EL)	- [Song	0	•	1
Two.txt]														
Back	Refresh	B Info	Save	Submit	Reject	Preview		Task Comments	Go To A Segment	Return To Inbox	ABC QA Checks		Data	
	Page			Task				Actions		Inbox	QA			ettings
10	Mingle wit	h the good	d people w	e meet, ye	ah!		0	Mingle wit	th the good pe	eople we meet,	yeah!			^
11	Good frier	nds we hav	ve, oh, goo	d friends	we have lo	st	0	Good frier	nds we have,	oh, good friend	s we have los	t	6	
12	Along the	way, yeah	1				0	Along the	way, yeah!					
13	In this gre	at future, y	you can't fo	orget your	past;		0	In this gre	at future, you	can't forget you	ır past;			
14	So dry you	ur tears, I :	seh.				0	So dry you	ur tears, I seh	L			6	
15	Yeah!						0	Yeahl						
16	No, woma	in, no cry;					0	No, woma	in, no cry;					
17	No, woma	in, no cry.					0	No, woma	in, no cry.				6	

In the Translation Interface you can:

- Perform translation and preview your translation in the browser.
- Add comments to the task at task and segment level.
- □ Automatically copy translations to identical segments.
- Reapply master translation memories (TM), update and apply the working TM.
- Apply terminology to the translation and browse terminology databases.
- Perform a Concordance search of translation memories.
- Review the translation.
- □ Submit the task to the next workflow step or reject the task.

Translation Interface Display Options

Display options appear at the top of the screen. You can choose to display the menu as **Default** (buttons are large icons with labels) or **Minimized** (buttons are small icons only) while editing the **User Preferences** tab or simply by clicking the arrow on the right!

🖶 Jon	Snow R	evert + Ir	nbox⊧De	rno Orga	nization	Ti Den	o (Translatio	n RO > El	N-GB) - [Tran	slation Demo	Txt"] 🚱	•	Ł
Back	G Refresh	B Info	Save	Submit	de la constante de la constant	Preview	Task Comments	Go To A Segment	Return To Inbox	CA Checks	Data Sources		
	Page			Task			Actions		Inbox	QA	Settir	gs	
							OR						
R Jon	Snow R	evert ⊁ Ir	nbox + De	rno Orga	inization	Ti Den	no (Translatio	xn RO > El	N-GB) - [Tran	slation Demo	.Txt*] 🔮		T
	0 🖬	• •	§ 🗊	۵	19	¢							-

Translation Interface Segment Level Options

Segment level options appear as icons in the segments themselves.

Click the **Settings** button to display the **Translation Page Preferences** tab screen where there are several options for controlling the way the screen looks. The **Translation Page Preferences** tab screen is described later in this chapter.

Translation Interface Buttons and Icons

Button	Description
	Save – Click this to save the translation. If you are working on a lengthy translation, you should save regularly. If you lose your internet connection, all unsaved edits are lost.
•	Submit – Submit this task to the next workflow step. This removes the task from your SDL TMS inbox. If the task is currently owned by a group (not you), this button is disabled.
•	Reject – Return this task to the previous workflow step for correction. Before rejecting the task, you must add a comment explaining why you are rejecting it.
III.	Preview – Click this to preview the translation.
Т.	Task Comments – Click this to display the Task Comments tab screen where you can add a new task-level comment and read any previously added comments.

R	Go to a segment – Click this to go to a particular segment. You must specify the segment number.
٥	Settings – Click this to display a tab screen where you can update your personal settings for the Translation Interface , such as the maximum number of segments displayed at a time, for example.
-	Return to Inbox – Click this to exit the Translation Interface and go to your SDL TMS inbox.
•	TM – Click this to display the Translation Memory tab screen where you can choose to reapply a translation memory (TM) or update the working TM.
P	Terminology – Click this to launch an online terminology database in the browser. You can browse the database if you have a valid login.
6	QA Check Override – Click this to display the QA Check Override tab screen where you can explain why segments that previously failed a QA check have not been edited before submitting the task again. This prevents the task being rejected a second time for failing the same check.
Ŷ	Display Filter – Click this button to display the segment display filter options.
•	Display Filter – Click this button to display the segment display filter options. Download Source – This button is displayed for an Engineering step only. It enables an engineer to download the source file for this task.
•	Download Source – This button is displayed for an Engineering step only. It
•	 Download Source – This button is displayed for an Engineering step only. It enables an engineer to download the source file for this task. Download Target – This button is displayed for an Engineering step only. It
 ▼ ◆ ◆ ◆ ● ● ● 	 Download Source – This button is displayed for an Engineering step only. It enables an engineer to download the source file for this task. Download Target – This button is displayed for an Engineering step only. It enables an engineer to download the target file for this task. Upload Target – This button is displayed for an Engineering step only. It enables an engineer to download the target file for this task.

Ę,		TM Lookup – Clicking this will perform one of two actions:
		If all or part of the text is selected, a concordance search is performed.
		If no text is selected, a TM lookup is performed.
		Both of these operations are executed against the entire TM sequence that is being used for that task.
6	8	Edit locked segments – This indicates the current 'lock' status of the segment. Locked segments cannot be edited (the text in locked segments is grayed out). To toggle locking on/off, click the icon. If you cannot unlock locked segments, you do not have the necessary permissions.
		Click this to add a comment for this segment.
		Click this to read comments added for this segment and add new comments.
¢	*	If you are reviewing a task, click the star to display the Reviewer Grading window.
		If you are translating a task, click a star with a dot inside it to display details of errors in the segment translation recorded by the reviewer.

What the Colors in the Translation Interface Mean

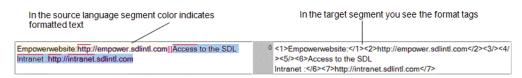
The color of the dividing bar between the source and target segment tells you the current status of the segment translation:

70	Green – Indicates a fuzzy match translation from a translation memory. The number that appears here is the degree of match.
75	Blue – This is a confirmed translation. Translations are confirmed when the translator exits the segment by pressing the Enter key. Segments translated by applying PerfectMatch are automatically confirmed by the system. They are also locked. If you open a new task and find that some segments are already confirmed and locked, it is because PerfectMatch was applied when the file was being prepared for translation. PerfectMatch translations are treated as 100% translation memory matches.
100	Gold – Indicates that an exact match for the segment was found in the translation memory (TM) and the TM translation has been applied.
o	Purple – Indicates that no match for the segment was found in the translation memory and machine translation has been applied.
60	Orange – Indicates that this is an autopropagated translation. This means that the translation from another segment has been copied to this segment because the content of both segments is identical. Autopropagation takes place automatically when the translation for the first segment is confirmed. The number indicates the original degree of TM match found during pre-processing.
	Gray – The divider is colored gray when:
	found during pre-processing.
0	You edit a segment (the color changes to gray as soon as you start typing in the target segment).
	You exit a segment you have been editing without pressing Enter.

Format Painting and White Space Markers

Color is used to indicate where text formatting has been applied to text in the original language file. Each chunk of text affected by text formatting is highlighted in color. The colors themselves are not significant and a particular color does not indicate a specific type of formatting. This method of indicating where text formatting occurs is referred to as Format Painting.

Format painting appears in source segments only; the target segments contain the formatting tags:.



When translating, you must ensure that the formatting tags are correctly placed in the target text to replicate the formatting in the source segment.

You can also opt to display special markers that identify the nature of the white spaces that appear between words. These markers appear in source language segments only:

- A red dot indicates a space.
- A red circle indicates a non-breaking space.

Format painting and white space markers are optional and you can remove them both from the screen if you want. Both options are controlled from the **Translation Page Preferences** tab screen. This screen is displayed when you click the **Settings** button.

Controlling the Size of the Screen

You control the maximum number of translation units (source and target language segment pairs) that can be displayed. You do this by specifying a maximum number of rows on the **Translation Page Preferences** tab screen. Tasks that contain more translation units than the specified limit are displayed over more than one screen. For example, you could:

- Specify a high number to ensure that tasks are displayed on a single screen, navigated by scrolling up and down.
- Specify a low number to ensure that each task is displayed on a series of screens, navigated by clicking the Next Page and Previous Page navigation arrows.

The **Translation Page Preferences** tab screen is described later in this chapter.

Translation Interface Navigation Pane - Search Options

The navigation pane contains search options:

Search	C
Go To	
Job 💌 #	•
Live data only	
Main Search	
> Concordance Search	
- Terminology Search	
Choose Terminology DB	0
Clu Multiterm	-
Choose Language	0
[EN-GB]	۵ 🔛
[FR]	0
Wildcard search	
Search text:	
P Search	

- Main Search, is a search for jobs and tasks. When you find the job or task you want to see, the job or task details are displayed in a different screen. You can navigate back to the Translation Interface when you have finished.
- Concordance Search, enables you to search a translation memory for a specified text fragment. Segments containing the fragment are displayed in the search results and the segment translation is also displayed. You can copy and paste text from the search results into the current document.
- **Terminology Search**. enables you to search a termbase. You can search the source language or the target language terms. Search results can be pasted into the current document.

To display the search options, click the **Search** button in the navigation pane. When you click the **Search** button, the **Terminology Search** option is displayed by default.

Windows Available from the Translation Interface

The windows listed below are all available in the **Translation Interface**; some appear as individual tabs at the top of the screen, others open below the current segment.

The following windows appear at the top of the Translation Interface:

- Translation Memory From here you can reapply a translation memory (that was previously applied to the task during the pre-processing step), apply the working translation memory (TM) or update the working TM.
- **Display Filter** This is where you can set filters to display only the segments you want to see in the **Translation Page**.
- **Task Comments** This is where you add or read task level comments.
- **Translation Page Preferences** This is where you specify how you want the **Translation Interface** to look.
- **Run QA Checks** Select and run QA checks.
- □ **QA Check Results** Jump to segments containing errors from this window. You can then fix the errors and run the QA checks again.
- **QA Check Override** This is where you override a QA check that the task previously failed.
- **Go To a Segment** Use this window to navigate the current task by specifying the segment you want to be displayed.
- □ **Concordance Results** Displays the results of a concordance search. If there are no search results, the window will not be displayed. You can copy translations from here and paste them into the task.
- **Task Upload** This window is only available in Engineering steps. The window is used to upload a localized task which has been engineered offline.

The windows can all be displayed at the same time. To switch between the windows, click the window names. To close a window, click the close button of the window.

The following windows open below the segment you are currently editing:

- **Segment Comments** This is where you add or read comments for the current segment.
- **Segment History** This is where you can view the translation history of the current segment.

Reviewer Grading– This is where the reviewer assigns a quality rating to a segment translation. If the reviewer then rejects the task, the translator can also display this window to view the reviewer's feedback.

Task Comments

This tab screen is displayed when you click the **Task Comments** button. Use it to view existing task level comments and add new ones.

Task Comments ?	ĸ		
Creation Date 🔺	Comment	User	Workflow Step
There are no previou	us comments for this task.		
	1	Jon Snow	Translation
		.1	Tansalon
			Add Comment

To add a comment, enter the comment text and click the Add Comment button.



NOTE

To add/read segment level comments, click the **Segment Comments** icon (to the right of the target language segment).

Translation Memory

This tab screen is displayed when you click the **TM** button. From here you can:

- Update the Working TM (translation memory) with translations from this task.
- Apply the Working TM to the current task.
- Reapply a Master TM to this task.

NOTE

When you apply a TM (working or master) to the current task, locked segments and segments translated with a 100% TM match are excluded from the update.

Translation Memory ? 🗙					
TM Apply				TM Update	
Translation Memory		Threshold To Apply	Action	Translation Memory	Action
Demo TM	•	70% 💌	Apply	Demo Working TM	Update

A master TM is a translation memory that was applied to this task during pre-processing. More than one TM may have been applied in a sequence and you can reapply them one at a time.



NOTE

You cannot automatically undo changes made to the translation as a result of the reapply. If you are about to reapply a master TM, SDL recommends that you save the current translation first, then, if you do not want to retain the changes made by applying the TM, you can close the task without saving and then reopen it again from your SDL TMS inbox.

The working translation memory is shared with other translators. You can update the working translation memory with translations as soon as you have made them and other translators can apply those translations to their own tasks.

To apply a TM (master or working) to the current task:

- 1 Click the down arrow in the Translation Memory box and select the TM to be applied.
- 2 Click the down arrow in the **Threshold to Apply** box and select the fuzzy matching threshold to be applied. If the required figure does not appear in the list, select the **Other** option to display the % box. Enter the figure in this box.
- **3** Click the **Apply** button.



NOTE

Locked segments, confirmed segments and segments translated with a 100% TM match are excluded from the TM Apply.

To update the working TM with new translations from the current task:

- 1 In the **TM Update** part of the tab, select the working TM to be updated.
- 2 Click the **Update** button.

Translation Page Preferences

Click the Settings button to display the Translation Page Preferences tab screen:

Translation Interface Preference	8 ? X	
Segments per page	100	0
Display terminology		0
Show white space		0
Hide source tags	V	0
Enable autopropagation		θ
		Submit

The options here control the appearance of the Translation Interface. You can specify:

- The maximum number of rows (segments) to be displayed.
- □ Whether terminology database matches are identified.
- □ Whether format painting and white space characters appear.
- Whether autopropagation takes place.

Update the settings and click the **Submit** button. Changes are effective immediately. The online Help describes the settings in detail.



NOTE

These settings also appear on the User Preferences tab of the My Details screen.

Display Filter

Filter Settings ? ×				
Enable Filtering				
Match Type:		Segment State:		Filter Description:
PerfectMatch		Confirmed	Not set 💌	Include all segments.
100% matches		Locked	Not set 💌	
Fuzzy matches		Machine translated	Not set 💌	
No match	\checkmark	With comments	Not set 💌	
		With term matches	Not set 💌	
Hide repetitions		Changed at last human step	Not set	
			Submi	t Reset

Click the **Display Filter** button to display the **Display Filter** tab screen.

The options here control the filtering of segments in the Translation Page. You can specify:

- □ Whether to enable display the filtering.
- □ Whether to enable the match type:
 - PerfectMatch.
 - □ 100% matches.
 - Fuzzy matches.
 - No matches.
- Whether to hide repetitions.
- □ Whether to set the Segment state as:
 - Not set.
 - Always.
 - I Yes.
 - No.
- For the Segment states of:
 - Confirmed.

- □ Locked.
- Machine translated.
- □ With comments.
- □ With term matches.
- Changed at the last human state.

The Filter Description gets updated as you select filter criteria. Apply the filter by clicking **Submit**. Changes are effective immediately.



NOTE

To disable the filter, uncheck the **Enable Filter** checkbox and click **Submit**. The **Reset** button displays the options as they appear on first use. Click **Submit** to apply this change.

Run QA Checks

Checks		Humber Separa	tors			Segments To Exclude	
Format Paint/Tags	12	Source thousan	de l	Target thousand	60°.	100% Matches	10
Require same order	$\overline{ \mathcal{C} }$	annera.	۲	comma		Autopropagated Segments	8
Terminology	192	Source decimal	6	Target decimal		Locked Segments	12
All Segments Confirmed	10	det .		101			
All Segments Translated	122						
Nambers	121						

Click the Run QA Checks button to display the Run QA Checks tab screen.

Use this window to select and run QA checks on your document. These checks verify, for example, that all segments have been translated and that the correct terminology was used. These checks are available regardless of the workflow you have chosen.



NOTE

Depending on the workflow selected, there may be automated QA checks that are performed as a workflow step. For more information, see QA Checks on page 4-3.

The following checks are available:

- **Format Paint/Tags** This checks that the target text contains all format paint that is present in the source and fails if any tags are missing or incomplete.
 - **Require same order** This checks that the tags are in the same order as they appear in the source.
- **Terminology** This checks that the target text contains any term hits from the configured terminology sequence and fails if any of the target terms are not present.
- □ All Segments Confirmed This checks that all segments for the current task have been confirmed and fails if any of the segments are not confirmed.
- All Segments Translated This checks whether the target text is different from the source text and fails if the translation is the same as the source text.
- **Numbers** This enables the Number Separators options which allow to check if translated numbers are formatted as per the options set.
- **Source / Target thousands** Select the thousand separators that the source text uses and the thousand separator that the translated text should use.

- **Source / Target decimal** Select the decimal separators that the source text uses and the decimal separator that the translated text should use.
- Segments to exclude This set of options prevents the QA checks from running on segments that are 100% Matches, Autopropagated Segments or Locked Segments. You may want to do this for segments that do not need further verification.



NOTE

You can also choose to exclude certain classes of segments from being checked. You may want to do for segments that do not need further verification.

To run QA checks:

- 1 Click the **Run QA Checks** button on the **Translation Interface**. The **Run QA Checks** tab is displayed.
- 2 Select which QA checks you want to run.
- 3 Select if you want to exclude any segments from the QA checks.
- 4 Click Verify. The results are displayed in the QA Check Results window.

QA Check Results

The **QA Check Results** window automatically displays when you run **QA** checks from the **Run QA Checks** window.

Run QA Checks ? × QA Check Results ? ×	
Format Paint/Tags	×
Terminology	×
All Segments Confirmed	×
1 All segments should have their translations confirmed	1 2 8
All Segments Translated	×
 All segments should be translated. 	3 4 5 6 7 10 11 12 13 14 15 18 1
Numbers	

Click a segment number to go to that segment and fix the error.

This window contains the results of the QA checks run from the **Run QA Checks** window. You can use this window to jump to segments containing errors. You can then fix the errors and run the QA checks again.

- This symbol indicates that there were errors found and lists the segments containing the error.

To use the search results in the current task:

- 1 If an error was found, click the segment number to go to that segment and correct the error.
- **2** After you have fixed all of the errors, run the QA checks again.

QA Check Override

Click the **QA Check Override** button to display the **QA Check Override** tab screen:

ide	0	Quality Assurance Check History
	-	Step Checkhilly pilles Batadons
on	0	There are no records to display.
	Apply	

QA Checks are automated checks that are run on tasks immediately after translation. If a task fails a QA check, it is rejected and returned to the translator. A task level comment is added to the task explaining why it failed the check. There are three types of QA check. Each one looks for segments that appear to be in error because:

- They have not been translated.
- □ They have not been confirmed.
- They contain terminology for which the termbase translation has not been used.

Ordinarily the way to handle tasks that fail a QA check is to correct the segments in error and resubmit the task. However, sometimes there may be a legitimate reason for not changing a segment and in these circumstances you can override the QA check. When you override a QA check, the check is skipped completely when you resubmit the task. QA checks are performed one at a time. If a task fails a check, it is immediately rejected back to the translation step before the next check is performed. This means that if you override a check that initially failed, the task may still fail the next QA check.

To override a QA check:

- Click the QA Check Override button on the Translation Interface. The QA Check Override tab is displayed.
- 2 Select Override.
- 3 In the Reason box, enter a comment explaining why the segment(s) cannot be edited
- 4 Click Apply.

5 When you have finished working on the task, click **Submit**. The task will skip the QA check that was overridden, but other QA checks may still be performed on the task.



The reason you give here for overriding the check can be seen in the QA Check reports.

Concordance Results

The **Concordance Results** window is displayed automatically when you perform a concordance search and there are some search results to be displayed.

Results are ordered by match percentage (shown in the central column) and the search text is highlighted in the results. You can copy and paste results from here into target segments.

Go To Segment

Click the Go To A Segment button to display the Go To A Segment window.

Enter the number of the segment you want to display and click Go.

Reviewer Grading

If your company is capturing feedback on the quality of translations, the feedback is captured in the **Reviewer Grading** window. Feedback is captured at segment level and the window appears immediately below the segment where the cursor is currently located.

To display the window, click the star icon that appears below the segment message icon, to the right of the target segment.

Click the star to display the click the star to display the

The options available in the **Reviewer Grading** window vary, depending on which QA model your company has chosen to use. The example below, shows one of the default QA models, SAE J2450.

Doc Language	Doc Formatting	Help Formatting	Help Formatting - Asian	Software Formatting
Software Function	onality Testing	Ooc Formatting - As	lan	
	Mino	r	Major	Critical
Mistranslation	- (+	- 0 +	- 0 +
Accuracy) +	- 0 +	- 0 +
Terminology) +	- 0 +	- 0 +
Language	-	+	- 0 +	- 0 +
Style		- +	- 0 +	- 0 +
Country) +	- 0 +	- 0 +
Consistency	-	+	- 0 +	- 0 +

If you are using a QA model created for your company, whoever set up the model should explain what the feedback categories represent and how to use them.

When the **Reviewer Grading** window is available, QA model information appears at the top of the Translation Interface. In the example below, the reviewer has recorded more errors for the task than are acceptable on this QA model; as a result the task has an **Overall Quality** status of FAIL.

QA Model My QA model for demo (Absolute) Feedback Level Task Threshold 80.00 Overall Quality 85 FAIL

Reviewer - How to Complete the Reviewer Grading Window

- 1 Place the cursor in a target segment that contains errors.
- 2 Click the star icon to display the **Reviewer Grading** window.
- **3** Locate the category to which the error belongs (for example, Spelling) and decide on the severity of the error (for example, minor or serious).
- 4 Add the error to the appropriate category/severity box. For example, if there are two minor spelling errors add 2 to the spelling-error/minor total for the segment. Click the plus and minus buttons to add or change the number. The number you enter is multiplied (in the background) by the multiplier defined for this category/severity. For example, 2 minor errors may generate a score of 2 but two major errors may generate a score of 10. This score is added to the overall score for the task and displayed at the top of the **Translation Interface**.
- **5** When you have finished logging errors for the current segment, click the star icon again to close the **Reviewer Grading** window.
- 6 Continue reviewing the document until all errors have been logged.

When you have finished reviewing the task, it will either have passed or failed the QA model review. You must now decide whether to **Submit** or **Reject** the task.

Translator- How to View the Reviewer Grading Window

You will only see the **Reviewer Grading** window when a reviewer rejects a task for which the window has been completed. When you receive the rejected task, you can view the translation feedback that has been recorded in the **Reviewer Grading** window.

If the **Reviewer Grading** window is available for a segment, the star icon changes appearance to look like this \bigstar . Click the icon to display the window. You cannot edit the contents of the window.

When you have finished, click the star again to close the window.

Segment Comments

Click the **Segment Comment** icon 😕 to display the **Segment Comment** window.

Creation Date 🔺	Comment	User	Workflow Step
02/11/2016 18:13	The terminology used is incorrect.	Sam Smith	Language Review
		Sam Smith	Language Review
			Add Comment Close

Type the comment text in the edit box proved and click **Add Comment** to save it. Previously added comments are displayed above the edit box. Click **Close** to close the **Segment Comment** window.

Segment History

Click the **Segment Comment** icon (3) to display the **Segment History** window.

Creation Date 🛛 🍝	Text	User	Workflow Step
02/11/2016 18:06	I really like and enjoy to celebrate my birthday with my friends in February		Pre-processing
02/11/2016 18:16	J'aime vraiment célébrer mon anniversaire avec mes amis en février.	Sam Smith	Language Review
			Close

When you have finished viewing the translation history of the segment, click **Close** to close the **Segment History** window.

TRANSLATING IN THE TRANSLATION INTERFACE

Activating and Editing Target Segments

Before you can edit a target segment, you must first activate it. This is done by clicking anywhere inside the segment. Once the segment has been activated, place the cursor where you want to start typing and you are ready to begin. When you exit the segment, it is deactivated again.

Some segments may be locked when you open a task. Locked segments cannot be edited. If you have the necessary permissions, you can unlock a locked segment by clicking the **Segment Locking** icon. In locked segments, the text is grayed out and the **Segment Locking** icon looks like this:

Confirming Segments

To exit a segment you can either press the **Enter** key or click anywhere outside the segment. When you exit by pressing **Enter**, you confirm the segment translation. This indicates that all work on the segment has been completed. When you confirm a segment, the following happens automatically:

- □ The dividing bar between the source and target segments changes color to blue; this makes it easy to see which segments are finished.
- The translation is 'autopropagated' to any other segments in the task that have identical source content.
- The untranslated words total for the task is reduced by the number of words in the segment.

You can also confirm several segments at the same time. Place your cursor in the first segment and press **Enter** repeatedly until you reach the last segment. To un-confirm a segment, click inside the segment and start editing.

Autopropagation

Autopropagation is the process whereby confirmed translations are automatically copied to other segments that have identical source text. In segments translated by autopropagation, the dividing bar between the source and target segments is colored orange.

If you do not want autopropagation to take place, you can disable it on the **Translation Page Preferences** tab screen. To display this screen, click the **Settings** button.



NOTE

Locked segments and confirmed segments are excluded from Autopropagate updates.

Saving and Submitting a Translation

During translation, you should save your work at regular intervals by clicking the **Save** button. If you lose the internet connection when you are working on a task, you will lose any edits made since the last time you saved the task.

When you have finished the translation, click the **Submit** button to send the task to the next workflow step.

Translating Tasks in the Translation Interface

Before you start:

Read the description of the **Translation Interface** earlier in this chapter.

To translate a task on the Translation Interface:

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Click the Inbox option in the navigation tree. The Inbox View screen is displayed.
- 3 In the **Inbox View**, click a link in the **Task Count** column. The tasks in the selected job are displayed on the **Inbox View (Tasks)**.
- 4 Choose a task to be translated:
 - □ If you do not currently own the task (if your name does not appear in the **Users Assigned** column on the **Inbox View (Tasks)**, take ownership of the task before you start the translation.
 - □ If you want, download a copy of the source file (the file submitted for translation) and any reference material for the task.
- 5 Click the link in the Filename column. The task opens on the Translation Interface.
- 6 Click the Task Comments button and check any comments added in earlier steps.
- 7 Click the **Preview** button to see what the task looks like at the moment.
- 8 Locate the first segment that requires translation. When you first open the task, this will be any target language segment where there is a green, gray or purple dividing bar between the source and target segments.
- **9** Activate the target segment (click inside the segment).

10 Place the cursor where you want to start typing and edit the text:

If	Then
you want to reapply a master TM or the working TM to the task	save the task and then click the TM button. The Translation Memory tab screen is displayed. Complete this to select and apply a TM.
	After applying a TM, if you decide that you want to remove changes made to the translation as a result of applying the TM, close the task without saving and start again from step 3.
you want to perform a TM lookup for a specific segment	click the TM Lookup icon. The lookup is performed in the entire TM sequence for that task.
	The results are displayed below the segment. Click Apply to replace the content in the target segment with the results of the TM lookup.
you want to search a termbase for terminology	click the Search button in the navigation pane. The Terminology Search fields are displayed by default.
you want to perform a concordance	Do one of the following:
search	Highlight the text in a segment that you want to use as your search criteria and click the TM Lookup icon. The concordance search is performed in the entire TM sequence for that task. The results are displayed below the segment.
	Click the Search button in the navigation pane and click the icon preceding the Concordance Search option.
you want to add or read a segment comment	click the Segment Comments icon.

- **11** Exit the segment:
 - If the translation is complete, press the **Enter** button to exit and confirm the translation.
 - □ If you have not finished working on this segment, click anywhere outside the segment to exit without confirming.
- 12 Repeat steps 7 9 for the next segment requiring translation. At any time you can:
 - Preview the translation (click the **Preview** button).
 - Save the translation (click the **Save** button).
- **13** If you want to see certain types of segments only, click the **Display Filter** button and select the appropriate criteria.
- 14 Continue until all segments requiring translation have been translated:

lf	Then
you want to update the working translation memory with the new translations	click the TM button and complete the Translation Memory tab screen.
you want to add a comment for the task	click the Task Comments button and complete the Task Comments tab screen.

15 Click the **Submit** button. The task is sent to the next workflow step.

Perform a TM Search for a Specific Segment and Apply the Search Results

You can perform lookups in the TM for a specific source segment during translation. The search is executed against the entire TM sequence for the task and the search results are displayed below the segment. You then have the option to apply the results and replace the existing translation.

NOTE

You can also apply the TM to the whole document, see Translation Memory on page 4-30.

1 Click the **TM Lookup** 🗟 icon.

Search results are displayed below the segment. Results are ordered by match percentage (shown in the central column).

1	This is a blue house in a village.	100 Ceci est une maison bleue située dans un village.	App
2	This is a blue house in a city.	86 Ceci est une maison bleue située dans une grande ville.	Арр
2	This is a black house in a town.	73 Ceci est une maison noire située en ville.	there as the second

2 Click Apply to replace the existing target translation.

Perform a Concordance Search and Use Search Results in the Translation

A concordance search enables you to search a translation memory for segments containing a sequence of characters specified by you. For example if you search for the word 'print' the search will find all segments containing that word. The search could also find 'printed', 'printer' and 'printing' depending on the **Minimum Match Value** you have specified.

- □ The search results show both the source segment and the translation. You can copy and paste translations from the results into the document being translated.
- □ Your search text should contain at least four characters. You can perform a concordance search in any of the available translation memories (TMs).

The higher the value specified in the **Minimum Match Value** box, the closer the match must be in order for SDL TMS to consider it to be a match. For example if the search text is 'print' and the **Minimum Match Value** is set at 100%, only segments containing the word 'print' will be found in the translation memory. If the **Minimum Match Value** is set at 60%, then segments containing 'printer' and 'printed' will also be included in the search results.

There are two ways to perform a concordance search:

- □ You can perform a quick concordance search on the entire TM sequence by highlighting text in your document. When you use this method you do not have to specify the minimum match value or which TMs to search.
- □ You can perform a concordance search where you enter the search text, select the TM to search and specify the minimum match value.

Perform a Quick Concordance Search

Performing a search using this method allows you to quickly perform the search and see the results.

- 1 Select some text in the source segment to use as the search criteria.
- 2 Click the TM Lookup 🗟 icon.

Search results are displayed below the segment. Results are ordered by match percentage (shown in the central column) and the search text is highlighted in the results.

9	
P	
	1 Hove my house.
	2 This is a black house in a town.
	3 This is a blue house in a city.
	4 This is a blue house in a village.
	5 This is a blue house in a town.

3 You can copy and paste results from here into target segments.

Perform a Concordance Search with Options

Performing a search using this method allows you to specify which TMs to search and the minimum match value.

- Click the Search button in the navigation pane to display the available search options. The Terminology Search option is active by default.
- 2 Click the icon preceding the **Concordance Search** option name to display the concordance search fields.

3 In the **Search for** box, enter the text you want to search for. You can type the text or you can select some text from a source segment and click the **Copy** icon. The search text should contain at least 4 characters.

Search	C
Go To	
Job 💌 #	•
Live data only	
Main Search	
✓ Concordance Search	
Search for	0
house	
	.41
4D	
Translation Memory	0
Demo TM	-
Language Pair	0
RO > FR	•
Minimum Match Value %	70
Maximum Number of Hits	10 🕕
D Search	

- 4 Specify a **Minimum Match Value** in the range I 100%. The higher the value the closer the match must be in order for the translation memory segment text to be considered a match for the search text.
- **5** Specify a **Maximum Number of Hits**. This is the maximum number of results you want to be displayed.
- 6 Click the **Search** button to start the search.

Search results are displayed on the **Concordance Results** tab screen. Results are ordered by match percentage (shown in the central column) and the search text is highlighted in the results.

on	cordance Results ? 🗙	
1	Have my house.	100 Jaime ma maison.
2	This is a black house in a town.	100 Ceci est une maison noire située en ville.
3	This is a blue house in a city.	100 Ceci est une maison bleue située dans une grande ville.
4	This is a blue house in a village.	100 Ceci est une maison bleue située dans un village.
5	This is a blue house in a town.	100 Ceci est une maison bleue située en ville.

7 You can copy and paste results from here into target segments.

Working with Terminology in the Translation Interface

If your organization uses a terminology management system, SDL TMS can be set up to work with this system. If the two systems have been integrated:

- The terminology database is automatically checked for matches when tasks are being prepared for translation.
- □ Where matches are found, you can check the terminology database entry and copy the term translation into the task.
- □ You can perform searches on the terminology database.
- You can launch the terminology management system in a browser.

If the navigation pane contains the **Terminology Search** option (click the **Search** button to display the search options), then SDL TMS has been set up to work with your terminology database (termbase).

Search	C
Go To	
Job 🔽 #	4
live data only	
Main Search	
Concordance Searc	ħ
- Terminology Searci	1
Choose Terminology D	-
TB B 2k15	~
Choose Language	0
[EN-GB]	• 200
(FR)	0
Wildcard search	
Search text: power	
P Sea	ch
power cord	
Cable d'alimentation	n
power cord	
명한 cáble d'alimentatio	n

When you open a task in the **Translation Interface**, any source text found to have a match in the terminology database is identified by a red line appearing above the text. Click the red line to display the term translation.

Terminology matches have red line above the text. Click the red line to display the terminology match and any translations. /

ų.				
2	AC power cord	0	AC power cord	6
0	cutantor [Copy] câble d'alimentation	0	adaptor	0

To see what was found in the terminology database, click the red line. A popup containing the source language term found in the termbase is displayed. If a translation for the term exists in the termbase, this is also displayed in the popup. You can copy the target language term into the target segment if you want to.

Copying a Target Language Term into the Target Segment

- 1 Click the red line to display the terminology popup.
- 2 Click the **Copy** link beside the target language term you want to use. The term is copied to your clipboard.
- 3 Select the text in the target segment to be replaced with the target language term.
- 4 Press **CTRL** + **Q**. The target language term replaces the highlighted text.

Perform a Terminology Database Search and Use Search Results in the Translation

Searches are performed in the **Terminology Search** option in the navigation pane. You can search the source language or the target language terms.

- Click the Search button in the navigation pane to display the available search options. The Terminology Search option is active by default.
- 2 Choose the termbase to be searched.
- 3 Select the language to be searched.
- 4 In the **Search text** box, enter the value you want to search for. You can search for terms that are an exact match for the search text you have provided or you can search for terms that contain the search text.
 - □ If you want to find all terms containing the search text, select the **Wildcard** check box. Otherwise, leave this box blank.
- **5** Click the **Search** button to start the search. Terms found to match your search criteria are listed below the text box:

If	Then
you want to see the translations held for a search result	click the blue highlighted text. The target language versions of the term are displayed.
you want to use a target language term in your translation	click the Copy link beside the translation, highlight the text in the target segment to be replaced with the target language term, press CTRL + V .

Viewing the Terminology Database in the Browser

Click the **Terminology** button to launch the terminology database application in a browser. Log on to the application and work with it as usual.

WORKING WITH REJECTED TASKS

Sometimes, translation tasks that you completed are returned to you for corrections to be made. The task may have been rejected by the person who reviewed it or it may have failed an automated QA check.

- 1 The first thing to do with any rejected task is read the task and segment level comments. These should explain why the task has been returned to you and what action you are expected to take to correct the problem.
- 2 If the star icon beside a target segment looks like this 🔶 (it has a dot in the middle), a reviewer has recorded errors in the segment translation. Click the star to see the number and type of errors. The error details are displayed in the **Reviewer Grading** window.
- **3** Correct the errors in the translation.
- 4 If the task failed a QA Check and you cannot make the change needed to stop it failing again, you must override the QA Check. To do this, click the QA Check Override button (on the Translation Interface). The QA Check Override window is displayed. In the window, explain why you cannot make the change that would stop the task failing the check. This time when you submit the task, the QA check is skipped. The reason you give for overriding a QA check is displayed in QA Check reports.
- 5 When you have finished working on the task, add a task comment explaining what you have done to correct the problems and then **Submit** the task to the next step.

PERFORM A MAIN SEARCH FOR JOBS AND TASKS

Use this option to look at details of other jobs and tasks. When you have finished you can navigate back to the **Translation Interface**. If you know the ID of the job or task you are looking for, use the **Go to** function to navigate to that job or task. This function only works for live data, and won't return any archived task or job:

- 1 From the drop down list, pick **Job** or **Task**.
- 2 In the free text field, type the ID of the job or task you are looking for.

Search		C				
Go To						
Job 💌	#	-				
Live data only						
▼ Main Search						
Look in	All Organizations	- 0				
For a	Job	- 0				
That	Contains	- 0				
Keywords		0				
More options						
Date		0				
D Search						

Click the icon preceding the Main Search option to display the job/task search fields.

- Click the Search button in the navigation pane to display the available search options. The Terminology Search option is active by default.
- **2** Click the icon preceding the **Main Search** option name to display the main search fields.
- 3 In the Look in box, select the organization to which, the job or task you are looking for belongs.
- 4 In the **For a** box, specify what it is you are looking for by selecting an option from the drop-down list.

- 5 In the **Contains** box, specify a condition to **The word or phrase** you will be entering in the next field to narrow the scope of the search.
- 6 In the **Word or phrase** box, specify some text that identifies the object of the search. For example, if you are looking for a job, enter some text that appears in the job name. SDL TMS will find all jobs whose names contain the specified text.
- 7 If you want to narrow the search, select **More Options**:
 - Under In Use, select All to search all jobs that have not yet been archived (this is the default option), select Yes to search only those jobs that are currently being worked on, select No to search completed jobs only.
 - Under Archived, select Yes if you want to search archived jobs only.
 - □ Under Date, if you want to narrow the search by looking for jobs by their creation or completion date, select the required date type. When you select a date type, further options are displayed. They enable you to specify the exact date or a date range to be searched.
- 8 Click **Search**. The jobs or tasks that match the search criteria are displayed in the **Search Results** screen. Click a job or task name to see the job or task in more detail.

NOTE

You can also use the search to find users, groups translation memories and translation memory sequences.

REVIEWING TRANSLATIONS

Completed translations are reviewed on the **Translation Interface**. Reviewers have access to the same functionality on this screen as translators. When the review is complete, you can either accept the translation or reject it. If you decide to reject it, you must add a comment explaining why:

- □ To accept a translation and send it to the next workflow step, click the **Submit** button.
- □ To reject a translation, add a task comment and then click the **Reject** button.

You can also download tasks for reviewing offline. Tasks reviewed offline must be uploaded to SDL TMS for submitting or rejecting.

Reviewing Tasks Online in SDL TMS

Before you start:

- Read the rest of this chapter as all of the functionality described for the translator is also available to you.
- 1 Click the Home navigation button. The Home navigation tree is displayed.
- 2 Select the **Inbox** option from the navigation tree. The **Inbox View** is displayed.
- 3 Locate a job that has Language Review in the Workflow Step column and click a link in the Task Count column. The tasks in the selected job are displayed on the Inbox View (Tasks).
- 4 Check who owns the tasks:
 - □ If *Unassigned* appears in the **Users Assigned** column, the task is currently assigned to a group. Take ownership of the task before you start the review. To take ownership, select the task **Select** box and click the **Take Ownership** button. You can take ownership of several tasks at the same time.
 - □ If someone else's name appears in the **Users Assigned** column, another group member owns the task and you cannot work on it.
 - □ If your name appears in the **Users Assigned** column, the task belongs to you.
- 5 If you want, download a copy of the source file (the original file sent for translation) and any reference material for the task. Select the task Select box and click the Download button.
- 6 Click the link in the Filename column. The task opens on the Translation Interface.

- 7 Click the **Task Comments** button and check any comments added in earlier steps.
- 8 If any of the **Segment Comments** icons look like this 🔄 , a comment has been added. Click the icon to read the comment.

→ NOTE

It is possible to filter to see the segments with comments only using the **Display Filter** button in the ribbon.

- 9 Click the **Preview** button to see what the task looks like.
- 10 If you want to edit a target segment, activate the segment (click inside the target segment), place the cursor where you want to start typing and edit the text. When you have finished, press the Enter button to exit the segment and confirm the translation.
- 11 If your company uses QA models, click inside a target segment where there is an error and then click the star icon it to display the **Reviewer Grading** window. Record the number and type of errors. When you have finished, click the star again to close the window.
- 12 Repeat steps 9 and 10 for the next segment that requires editing. At any time you can:
 - Preview the translation (click the **Preview** button).
 - □ Save the translation (click the **Save** button).
 - Add a task level comment or a segment level comment (click the **Task Comments** button or a **Segment Comments** icon).
- **13** Continue checking segments until the review is complete then either accept or reject the translation:

If	Then
you have completed the Reviewer Grading window	check the final score for the document. This is shown at the top of the Translation Interface.
you want to reject the translation	click the Task Comments button. Add a comment explaining why you are rejecting the task and what remedial action needs to be taken. Click the Add Comment button to save the comment. Click Reject . A confirmation message is displayed. Click Yes . The task is returned to the previous workflow step.

you want to accept the translation

click **Submit**. A confirmation message is displayed. Click **Yes**. The task is sent to the next workflow step.

14 Click the link provided in the information message to return to your inbox.

Reviewing Tasks Offline

1 Download the tasks from your SDL TMS inbox. Follow the procedures for downloading tasks described earlier in this chapter.



Remember to take ownership of tasks assigned to a group before you download them.

2 Review the task(s) offline and then upload them. Follow the upload procedure described earlier in this chapter.

If	Then			
you want to complete the Reviewer Grading window for the task	open the task on the Translation Interface . Click the star icon selected beside a segment in error. The Reviewer Grading window is displayed. Record the number and type of errors. When you have finished, click the star again to close the window. Continue recording errors until you have recorded everything you want to record.			
3 Accept or reject the task(s):				
If	Then			
you want to accept the translation	submit the task to the next step. You can do this from the Translation page or from your Inbox.			

you want to reject the translation	you can do this from the Translation Interface or from your Inbox. On the Translation Interface , add a task comment explaining why you are rejecting the task and then click Reject . A confirmation message is displayed. Click Yes . The task is returned to the previous workflow step. Alternatively, locate the task in your Inbox,
	select the task i and click Reject . A comment window is displayed. Add a comment explaining why you are rejecting the task and click the Submit button in the comment window.



4 Reviewing Translations

APPROVING TRANSLATIONS

This chapter provides an overview of approving tasks in SDL TMS. Sections include:

- About Approving Tasks
- Performing Approval

Chapter

5

ABOUT APPROVING TASKS

Approvers perform the final review of completed translation tasks. Approvers do not edit translations, they perform a visual check only. When you have finished the review, you can either approve or reject the translation. To help you make a decision you are able to:

- Preview the completed translation in a browser window.
- Open the task in the **Translation Interface** where you can view the translation in detail.
- Read any comments that have been added for the task.

Translations are approved by submitting them to the next workflow step. They are rejected by clicking the **Reject** button. Rejected tasks are returned to the previous step for correction. If you decide to reject a task, you must add a comment explaining why.

PERFORMING APPROVAL

- 1 In the SDL TMS opening screen, click Inbox.
 - □ If the **Inbox** screen, **Inbox View** is not displayed, click the **Home** navigation button and select the **Inbox** option from the navigation tree to display it.
- 2 Locate a job that has **Approval** in the **Workflow Step** column and click a link in the **Task Count** column. The tasks in the selected job are displayed on the **Inbox View (Tasks)**.
- 3 Check the values in the Users Assigned column and establish who owns the tasks:
 - □ If *Unassigned* appears, the task is currently assigned to a group and you must take ownership of the task before you start the review. To take ownership, select the task **Select**

box \square and click the **Take Ownership** button. You can select several tasks and then take ownership of them all at the same time.

- □ If someone else's name appears, another group member owns the task and you cannot work on it.
- If your name appears, the task belongs to you.
- 4 Click the link in the Filename column. The task opens on the Translation Interface.
- **6** If any of the **Segment Comments** icons look like this **a** comment has been added. Click the icon to read the comment.

NOTE It is possible to filter to see the segments with comments only using the **Display Filter** button in the ribbon. 7 Click the **Preview** button 👵 to display the task in a browser window. 8 Check the translations in the target language segments. 9 Accept or reject the translation: lf Then click the **Submit** button and click **Yes** in the you want to accept the translation confirmation message. click the Task Comments button first. In the you want to reject the translation Translation Comments tab screen, add the reason why you are rejecting the task and the next action needed, then click the Add Comment button. Click the **Reject** button. In the confirmation message, click Yes to return the task to the previous workflow

10 Click the link provided in the information message to return to your SDL TMS inbox.

step.



5 Performing Approval

WORKING WITH FRAMEMAKER FILES IN SDL TMS

This chapter outlines the requirements necessary to process Adobe FrameMaker content for translation using SDL TMS. Sections include:

- FrameMaker File Management Best Practices
- FrameMaker Book Processing in SDL TMS
- SDL TMS Workflow for MIF Files

Chapter

6

FRAMEMAKER FILE MANAGEMENT BEST PRACTICES

To facilitate the localization process of Adobe FrameMaker files in SDL TMS, SDL recommends that you follow the recommendations below before uploading any files to SDL TMS.



6

The procedure described hereafter only applies to the File Type called "MIF" that uses the Legacy Filter.

Before Saving Files as MIF files

Before you save your files as MIF files, you should make sure that there are no unresolved crossreferences in your files, that the correct conditional text settings are used, that index entries are used correctly, that you have allowed for text expansion during translation and that your files are singlesource.

Resolving all Unresolved Cross-references

Ensure that you resolve any unresolved or broken cross-references before you save FM files as MIF files. This is to ensure that cross-reference text is updated without error after translation.

Using Correct Conditional Text Settings

Ensure that you have the correct conditional text settings (such as Show/Hide, for example) before you save FM files as MIF files. Only text which is set to Show is extracted by SDL TMS for translation.

Using Index Entries Correctly

The amount of text in each marker in FrameMaker should be monitored during development and should not exceed 150 characters. Otherwise, the 256 character limitation for index markers in FrameMaker may cause issues during translation. Such issues may arise from expansion, or additions to enable Japanese sorting functions, for example.

Text Expansion

Text expansion occurs for the majority of languages during translation. SDL recommends that you design and author manuals to allow for text expansion. Otherwise, enough space may not be available for all text in the manual.

Single Source

Any FrameMaker files that you want to use in SDL TMS must contain one source language only. SDL TMS cannot process FrameMaker files with more than one source language.

Bi-directional Language Support

FrameMaker does not support bi-directional languages such as Arabic and Hebrew. For this reason, these languages cannot be used in the FrameMaker workflow in SDL TMS.

Before Uploading Files to SDL TMS

Before you upload your MIF files to SDL TMS, please take the points outlined below into consideration.

Extracting Reference Page Material

Reference pages in FrameMaker contain HTML mapping and index sorting data that does not require localization. For this reason, text from these pages is not pulled for translation. Any content such as "Caution", "Warning" or "Note", for example, that is linked to from the Reference page must be manually extracted and submitted for translation in a separate document. When this text has been translated, it can then be integrated manually during DTP.

Extracting Image Text

SDL TMS does not provide an automated solution for translating text embedded in images. Any text used in images must be manually extracted and submitted for translation in a separate document. When this text has been translated, it can then be reintegrated into images during DTP.

Excluding all Generated FrameMaker Files

Do not include any FrameMaker book (BOOK) files or any generated FrameMaker files, such as Table of Contents (TOC) or Index (IX) files, if these are generated within FrameMaker. All translated text will come from the heading text and index markers throughout the product manual or document when the book is updated after translation.

Preparing Files that use WebWorks Conversion

If the FrameMaker files you are using will later be converted by WebWorks, you must include the whole source directory within the reference material ZIP file that you upload to SDL TMS. This source directory must include source files, image links and final output as well as the relevant templates.

Using One SDL TMS Job Only per Product Manual

When you are uploading source MIF files into SDL TMS, please ensure that you upload chapters from a single product manual or FrameMaker book at a time. This is so that the index, cross-reference and variable files created by SDL TMS when you submit MIF files are valid for the content in the job. If you upload chapters from different product manuals or documents into the same job, the index, cross-reference and variable files will no longer be valid for individual product manuals or documents.

FRAMEMAKER BOOK PROCESSING IN SDL TMS

When you submit a set of MIF files (all from the same product manual or FrameMaker book) for translation in a job, SDL TMS can check the files and extract common content for translation. Common content comprises: index entries, cross-references and variables. These are placed in specially created tasks and submitted for translation. When they have been translated, the indexes, cross-references and variables are then placed in the translated FrameMaker book files.

To enable the processing of common content from a FrameMaker book, two workflow steps must be included in your standard MIF processing workflow: **Adobe FrameMaker - Extract Common Content** and **Adobe FrameMaker - Insert Common Content**.

Adobe FrameMaker - Extract Common Content Step

In the **Adobe FrameMaker - Extract Common Content** step, common content is extracted from the FrameMaker book files in a job and new tasks are created to hold the common content. The common content is extracted in three files, an index entry file (called SDLX_ix), a cross-reference file (called SDLX_xr) and a variable file (called SDLX_va). These files are always given the same name, regardless of the names of the files you submit for translation. A separate task is created for each file type and target language combination. For example, if the FrameMaker book files are to be translated into French and German, six new tasks will be created:

- □ Index entries target language French.
- Index entries target language German.

- Cross-references target language French.
- Cross-references target language German.
- Variables target language French.
- Variables target language German.

The common content tasks are added to the job containing the FrameMaker book (MIF) files and are processed using the same workflow as the MIF files.

Adobe FrameMaker - Insert Common Content Step

The **Adobe FrameMaker** - **Insert Common Content** step is a post-translation step in which the translated index entries, cross-references and variables are placed in the translated FrameMaker book files.

In order for translated common content to be placed in the FrameMaker book files, the tasks containing translated common content and the translated MIF files must all be available to the **Adobe FrameMaker - Insert Common Content** step at the same time. To achieve this, the **Adobe FrameMaker - Insert Common Content** step holds tasks that reach this step, at the step, until all tasks for the same target language are held. When all tasks for the same target language have reached this step, the translated common content is inserted into the MIF files and the MIF files are then submitted to the next workflow step. This will usually be a DTP step.

SDL TMS WORKFLOW FOR MIF FILES

When you are working with MIF files in SDL TMS, we recommend that you follow the workflow as outlined below.

1 Convert your FrameMaker files to MIF format.

|--|

NOTE

Do not include any FrameMaker book (BOOK) files or any generated FrameMaker files.

2 Prepare a ZIP file containing MIF files for translation (including files for translation of extra material, such as extracted content, for example).

\Rightarrow	

NOTE

Only include chapters from one product manual or one FrameMaker book at a time in the ZIP file to ensure that the index, cross-reference and variable files created by SDL TMS are valid for the content in the job.

3 Prepare a ZIP file containing any reference files you want to include.



NOTE

If the FrameMaker files you are using will later by converted by WebWorks, include the whole source directory containing source files, image links, final output and any relevant templates within this reference material ZIP file.

4 Upload the translation and reference ZIP files to SDL TMS.



Alternatively, you can upload any reference material you want to include in a separate step on the Reference Material page and associate the reference material to the job afterwards. This will avoid any time-out issues that may arise if you are uploading large volumes of material.

SDL TMS starts the job and carries out system workflow steps. These will vary according to the workflow you are using, but will always include the Adobe FrameMaker - Extract Common Content step.

- 5 Once the initial system steps have completed, the job needs to be authorized by the job creator or relevant authorizer. Once it has been authorized, the **Update Invoice** step takes place and the job can then be sent out for translation.
- 6 Once files have been approved, they can be returned to SDL TMS, where system steps are carried out. These will vary according to the workflow you are using, but will always include the Adobe FrameMaker - Insert Common Content step.
- 7 Once this step has been carried out, the job files can be downloaded for work by your DTP and localization engineering specialists.
- 8 Once you reach the DTP step, we recommend that you perform all file management, including final deliveries, outside of SDL TMS.

MANAGING JOBS AND TASKS

This chapter provides an overview of managing jobs and tasks in SDL TMS. Sections include:

- About the <Job name> Details Screen
- Displaying the <Job name> Details Screen
- Image: Second Second
- Managing Tasks
- Managing Vendors
- Dealing with Tasks in Exception
- Dealing with Tasks in Recovery

Chapter

7

ABOUT MANAGING JOBS AND TASKS

Jobs and tasks are managed from the **<Job Name>** - **Details** screen. Depending on your permission rights in SDL TMS you can, for example, edit job details, update dynamic cost variables, download files from a job, deactivate jobs and delete jobs. You can also manage individual tasks from a job by checking the task status, viewing task history, checking a user's task load, reassigning tasks, modifying step status, dealing with tasks in recovery and downloading completed translations.

About Vendor Jobs

A vendor is a localization service provider. In SDL TMS you can manage what tasks are assigned to vendors and monitor their task progress. For more information, see *Managing Vendors* on page 7-45.

About Studio Packages

These packages are 100% compatible SDL Trados Studio that you can export from TMS for translating and reviewing purposes. They have been specifically designed to function like native SDL Trados Studio packages, providing full compliance with the application and being capable of transferring all tasks, TMs and settings. For more information, see *Working with Studio Packages* on page 7-46.

About Reference Files

You can upload reference files to accompany a job or a project in SDL TMS. Reference files are not files for translation, but may include, for example, style guides, instructions for translators and background material. For more information, see *Reference Material* on page 7-49.

ABOUT THE <JOB NAME> - DETAILS SCREEN

The starting point for viewing and maintaining jobs and tasks is the **<Job name> - Details** screen. From here you can:

- Edit job details and delete jobs.
- Reassign tasks to other users or move them to another workflow step.
- □ View job and task status and examine task costs.
- Download files and translation memories.

<Job name> - Details screen example:

	My Organization	on + Jobs + My New J	ob - Details							0 1
	ter S		P. 24	B S	a Guste					
Job Details	7414		2.000							
	142.0									3 G 10
	Job Summary		Carrent Job Setta		Transiat	tem Programs	By Type: 732 To	dal Words, Language:	ER-US >	DE DE
	Native	My New Just	Name	Mi Cardonatan		Autopropag	eterd: 5 Words	V.		
	Jake	22	Description				-+ch/2274-			
	Description		Project Manager							
	Creation Date	11/01/2010 20:12	Client Contact		Confirm	ned: 42 Worth		1		
	Created By	Bystem Administrator	TH Sequences	TMs 2214						
	Date Date	110800162011	File Types	Test (Studio), Microsoft Viturit					translated	75 Words
	Barn Count	- topegroup putt		2007-2016						
	Add Costs	E M Add Could		(Studia)						
			Workflows	Basic Worldow						
is come			Cost Models	My Cost Model						
onfiguration rate the job	Job Cost									
	Cost Variable							Comment .	Ce	vi.
	Dynamic.lob								8	25.00
	Total Task Cost Pe	Linguage (EN-UE > P)	3						1	3.45
	Total Task Cost Pr	r Langiage (Ehi-Ut) = H	0-800							3.45
	Trial Task Cost Per Language (814-US > DE-DE) 5 7.07									
	Total Task Cost Per Language (EN-UE > FR-FR)							1	6.62	
	Total Task Cost Fier Language (EN-US + HU)								1	9.45
	Total Task Cost Pe	r Language (EN-LUE > 17	et)						5	7.87
Summarized view of the urrent status for the asks	Tutal Cost								1	74.54
ma inte inter			TT-4ap_lints							
13 101 110	19-4kg Status									
	H-Glap Status Language Pair	- Users A	ingned	Workflow Sleg	Statu		Taux Count	Word Count		lystem
	the second se	Uters A	algaed	Workflow Slog	Statu (+)	•	Tauk Count	Word Count		tystem At •
	Language Pair				10	e 1999 e e	Task Could	3	122	Contraction in the second
	Language Par EN4US > DE-DE			Transiston	10		Tasik Could		122	AL .
	Language Par EN4US > DE-DE			Transiston	10		Tasik Could	3		AL .
	Language Par EN4US > DE OE OHUS + DE OE		-	Transiston	10		Tasuk Count Word C	3		AL .
statistics	Language Par EN-US > DE-DE EN-US + DE-DE EN-US + DE-DE TT Languastic Ana	Jane Se	-	Translation Translation	in Pro	grea		3	732	AL .
	Language Par EHUS > DE DE PHUS > DE DE PHUS > DE DE Thurste Ana Tangwegt Par	auto Ser	-	Translation Translation	in Pro	grea		3	732	AL .

The screen is split into several parts:

- **Job Summary** Displays general job details.
- **TM Filters and Penalties** Penalties applied to TMs on the basis of filter values.
- TM Attributes Update Details of attributes that are updated on translation
- **Configuration Details** Displays details of the Configuration used to create the job.
- Translation Progress The Translation Progress chart provides information about the total number of words for all the tasks in the job. It also provides the segment status for all the tasks in the job, as well as the percentage and actual number of words for each status. The statuses change as the tasks progress through the workflow, when someone modifies the translation using the translation interface or uploads bilingual files translated offline. The chart provides the following statuses:
 - Untranslated
 - IO0%
 - Fuzzy
 - Machine Translation
 - Autopropagated
 - Confirmed: this category gathers segments that received PerfectMatch matches, as well as any segment that was originally 100% matches, Fuzzy matches, Machines Translation matches or newly translated segments that were confirmed.
- □ **Job Cost** Displays the total translation cost for the job. If this table is empty, no costs have been defined.
- **Stepstep Status** Displays a summarized view of the status of the tasks in the job.
- Linguistic Analysis Displays translation statistics.

Each part is described in detail below.

Job Summary:

Field	Description
Name	Name given to the job when it was created.
Description	Description of the job added when the job was created.

Creation Date	Date the job was created in SDL TMS.
Project	If this job is part of a project, the project name appears here. Click the Project name link to view the project details.
Created By	Name of the person who created this job.
Due Date	Date by which all work on the job should be completed.
Estimated Delivery	The date and time resulted after the estimated Duration for completing the job was added to the job's authorization date.
Date	→ NOTE
	The Duration field is only accessible on the Job Edit page.
Item Count	Number of files submitted for translation in this job.
Job data	If job specific data (for example, purchase order numbers or cost codes) was added for this job, the data details are displayed here.
Add Costs	Click the Add Edit Costs link to display the Add Costs tab of the <job< b=""> name>/Edit screen. This is where you can assign values to variables that appear in cost formulas.</job<>
Locally defined	If there are any locally defined fields, they appear here. These are fields that have been added to SDL TMS for your site.
Reference Material	If any reference material has been linked to this job, the file name appears here. Click the file name link to download the reference material.
Archived Job Data	If the job has been archived, you will see this additional field containing a link to a zip file. This zip file includes all information and files for the job, including reference material. The Reference Material field will now display the number of reference files but these will only be available for download from this zip file.
Configuration Details:	
Field	Description
Name	The name of the configuration that was selected when the job was created. This name changes if you change it when editing the configuration.

Description	The description of the configuration. This description changes if you change it when editing the configuration.
Project Manager	The name of the project manager associated with the configuration. This value changes if another name is selected when editing the configuration.
Client Contact	The name of the client contact person associated with the configuration. This value changes if another name is selected when editing the configuration.
TM Sequence	 This name is: either the name of the TM sequence set in the configuration's Default Association, if used at job creation, or the name of the TM Sequence chosen in the Select Overriding TM Sequence box at job creation, or, if the TM sequence is replaced when editing the configuration: the name of the new TM sequence used in the configuration, because this new TM sequence is the one that will be used for Update TM, or the name of the TM sequence selected in the TM Sequence Override box, because this TM Sequence remains in use for the Update TM.
File Types	The name of the file types in use in the job.
Workflows	 This name is: either the name of the workflow(s) associated with the file type(s) at job creation using the default associations, or the name of the workflow(s), if modified at the Authorization or the PjM Authorization step. Note: If the workflow is removed from the configuration, the live workflow remains valid for the job and therefore the name doesn't change in the job's page.
Cost Models	 This name is: either the name of the cost model(s) associated with the file type(s) at job creation using the default associations, or the name of the cost model(s), if modified at the Authorization step or the PjM Authorization step. Note: Cost Models are not visible to Vendors

Job Cost:

If a cost model has not been applied to the job, this table is empty.

Field	Description
Cost Variable	This column lists the variables that appear in the job cost formula used to calculate translation costs for this job.
Comment	If the job cost formula includes a dynamic variable and the variable has been updated, the person doing the updating has the opportunity to add a comment. If a comment was added, it appears here.
Cost	The amount that each variable in the cost formula represents. These are summed to give a job cost on the bottom row of this table.
Step Status:	
Field	Description
Due Date	Date by which this step should be completed. A date will only appear here if this job is part of a project and a project schedule has been applied.
Language Pair	Analysis of job progress is shown by language pair. Click a link in this column to display the Task Status Summary screen. This screen shows the individual tasks for this language pair and the current workflow step for each one.
Status	Displays the current status of the tasks at this workflow step for this language pair: In Progress (#% Complete) – The tasks are currently being worked on. The percentage figure tells you how much of the work has been done. Moving to Next Step – Indicates that the task is currently between steps. Complete – These tasks have completed this step.
System	By default, only human workflow steps appear in this table. You can also display automated steps performed by the system. Select an option from the drop-down menu:
	All – Display human and system steps.
	Yes – Display system steps only.
	No – Display human steps only.

Task Count	Number of tasks that will go through this step for the language pair.
Tasks In Progress	Number of tasks at this step for the language pair.
Users Assigned	User assigned to this workflow step for this language pair. Click a link here to display the Workload screen for this user.
Word Count	Number of words in tasks for this language pair.
Words In Progress	Number of words in tasks at this step for the language pair.
Workflow Step	Workflow step name. Click a link in this column to display all tasks at the same step (for the same language pair) on the Task Status Summary screen.
Linguistic Analysis:	
Field	Description
Confirmed	Number of words in confirmed segments. A confirmed segment is one which has been translated and is complete.
PerfectMatch	Number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files and are always exact matches (like a 100% translation memory match).
Fuzzy	Number of words translated by the system during pre-processing with a less than 100% translation memory match.
Hundred	Number of words translated by the system during pre-processing with a 100% translation memory match.
Language Pair	The figures are for this language pair. Click a link in this column to display the Cost Banding screen. This screen shows a detailed breakdown of translation statistics and also shows how translation costs have been calculated.
New	The number of new words found during pre-processing. New words are words that do not currently exist in the translation memory.
Repetitions	The number of words in repeated segments. The words in the first instance of a segment are added to the other totals. The words in repetitions of a segment are added to this total.
Unconfirmed	The number of words in segments which have not yet been confirmed.
Word Count	Total number of words in tasks for this language pair.

Buttons:

Field	Description
ŵ	Edit – Click this to display the <job name="">/Edit</job> screen. This is where you can update general job details, link reference material to the job, deactivate or delete the job. If you use dynamic cost variables in your cost formulas, this is where you can update the value of a variable.
•	Download – Click this to display the Download screen where you can download source files, ITD files, Studio Packages, SDLXLIFF files, completed translations, translation memories and reference material.
8 <u>8</u>	Authorization – If the job contains tasks at the Authorization step and you are the authorizer for those tasks, click this to display the Authorization Summary screen.
	Reassign – Click this to display the Reassign Tasks screen where you can select tasks currently assigned to one user and reassign them to a different user.
¢	Modify Step – Click this to display the Modify Step - Language Pair screen where you can move a task to a different workflow step. You can move it forward or backwards in the workflow.

Displaying the <Job name> - Details Screen

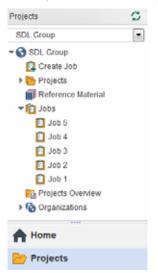
Method 1:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon [•] that precedes the organization to which the job belongs.
- 4 Select the **Jobs** option. The **Jobs** screen is displayed.
- 5 Click the job name in the Name column. The selected job is displayed on the <Job name> Details screen.

Method 2:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon [▶] that precedes the organization to which the job belongs.
- 4 Click the plus icon [▶] that precedes the **Jobs** option. All jobs for the organization are listed from the navigation tree.

5 Select a job from the list to display <**Job name**> - **Details** screen.



Method 3:

Throughout SDL TMS, there are a number of places where the job name is also a link. When you click the link, the **<Job name>** - **Details** screen is displayed. For example, the job names that appear in the **Authorized Jobs** - **In Progress** window of the **My Jobs** screen are links.

Method 4:

If a job is part of a project, the **<Job name>** - **Details** screen is still used to update the job, but you can access the screen via the **Projects** option on the navigation tree. The **Projects** option provides you with additional tools for managing multiple jobs simultaneously. For example, there is an option to assign users to workflow steps across all jobs in a project. For more information on working with projects, see Chapter 8.

<Job name>/Edit Screen

Updates to jobs are performed on the **<Job name>/Edit** screen. This screen is displayed when you click the **Edit** button on the **<Job name> - Details** screen. From here you can:

- Edit general job details.
- Link reference material to the job.
- Deactivate the job or delete the job.
- If you are using dynamic cost variables in cost formulas, you can update the value assigned to variables.

→	

NOTE

- □ You will not be able to edit jobs unless you have been given the necessary permissions.
- Vendors cannot edit jobs or add reference materials.

If you use dynamic cost variables in cost formulas, the screen has two parts: the **Defaults** tab and the **Add Costs** tab. If you do not use dynamic cost variables, only the **Defaults** tab is displayed.

<Job name>/Edit screen example:

Click a tat	b name to display the tab content		
Demo Grganization + Jubs + Demo + E	Edit		0 - 1
The Reveal of Costs	ate - Dorres		-
Demo - Defautta			
Kame	Demo		0
Description			0
Pytvata	10		0
Creation Date	8100001111220		0
Due Date	02/02/2017 13:25 🖸		0
Duration	4 day(s) 0 hour(s)		0
Configuration	Dens Confusion		0
Reference Material	Available Reference Material (1)	Selected References Material (1)	0
	themo Grganitation (2) • Instructions.fet	 Root Organization (1) Demo kel Net 	
File name		Drop file name or click to select.	0

Most of the fields on the **Defaults** tab have already been described as they are also part of the **<Job name> - Details** screen. These are the additional fields and buttons:

Field	Description
Private	If this is selected, the job is private. A private job cannot be seen by sub- organizations.
Reference Material	This is where you select reference material and link it to the job. Available reference material is listed in the box on the left. Select the required file(s) and click the right arrow to add them to the box on the right. When you Submit this screen the files are linked to the job.
R	Deactivate Job – Click this to terminate all processing on this job. A deactivated job cannot be reactivated. Deactivated jobs are still visible in SDL TMS screens but the job name entry is grayed-out in the navigation tree and no further processing can take place on the tasks in the job. The job will be removed completely the next time archiving takes place. You must deactivate a job in order to delete it.
â	Delete – Click this to remove a deactivated job from the system.

The **Add Costs** tab is used to assign values to variables used in job cost formulas. Only dynamic cost variables can be updated here.

📋 Demo Organi	ization 🕨 J	lobs 🕨 Ti	Demo 🕨 Ec	dit					6	01
Back Refresh	B Info	Submit	Deactivate Job	Delete						
Page			Actions							
Defaults Add	Costs									
Ti Demo - Add Co	sts									
RO > EN-GB	Per Langua	age								302.00
Demo Cost Varia	able Co	mment			Unit Value		Quantity			
				0		25.00		3.00 🕕		75.00
Grand Total										377.00

The boxes displayed here depend on what variables have been used in the job cost formula. Figures that are grayed out are calculated by the system and cannot be updated.

Each dynamic variable has three fields. Assign a value and quantity to each variable and the total job cost is calculated and displayed in the **Grand Total** box:

Unit Value	Enter the value to be assigned to the variable.
Quantity	If the variable is to be added more than once to the job cost, specify the number here.
Total	Displays the total value of the variable.

<Job name>/Cost Banding Screen

You can view a detailed breakdown of translation costs, by language pair, on the **Cost Banding-Language Pair** screen. This screen is displayed when you click a language pair link in the **Linguistic Analysis** table of the **<Job name>** - **Details** screen.

<Job name>/Cost Banding screen example:

Demo	Organ	nizatio	n 🕨 Jobs 🕨 Ti	Demo 🕨 C	ost Ba	nding - F	10 >	EN-GB									0	01
	G	B)															
	Page																	
Cost	Band V	Vord Co	ounts															
Task	Filenar	me 🔺	Confirmed	Unconfirm	ed	Word Co	unt	Repetitio	ns	Words Pe	r Ba	nd					% T	Leverag
										PerfectMa	atch	100 - 100%	99 - 80%	79 - 60%	59 - 40%	39 - 0%		
	Transla Demo (93		14		10	7	27		0	28	0	0	0	52		51.4
🖽 Cost	Band C	osting																
Minimum	Cost	Task	Filename -	Cost	Cost	Per Band											Rep	eated Co
					Per	(ectMatch		100 - 100%		99 - 80%		79 - 60%		59 - 40%		39 - 0%		
e	-	- 4	8 Translation Demo.bit	€302.00	€	0.00	€	84.00	e	0.00	€	0.00	€	0.00	€	52.00	€	13.5
e :	25.00			€ 302.00	e	0.00	€	84.00	e	0.00	e	0.00	e	0.00	€	52.00	e	13.5

To see the costs for a different language pair, select the language pair from the drop-down list in the **Language Navigation** box.

Field descriptions for the **Cost Band Word Counts** table:

Field	Description
Confirmed	Number of words in confirmed segments. Segments are confirmed by translators. A confirmed segment is one where the translation has been completed and is correct.
Filename	This is a source language file submitted for translation. The figures on this row relate to this file. Click the filename link to view the file in the browser.
Repetitions	Number of words in repeated segments. A repeated segment is a subsequent instance of a segment that has already been counted once. The Word Count total includes repetitions.
Task	Task ID. Click a task ID link to display the task on the Task History screen.
	→ NOTE
	Vendors cannot display the Task History screen.
%TM Leverage	Shows what percentage of words in this task were translated during pre- processing by applying translation memory.
Unconfirmed	The number of words in segments which have not yet been confirmed.
Word Count	The total number of words in the task.
Words Per Band	The columns here contain the translation analysis figures for the language pair.
PerfectMatch	The number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files. At job level, this number is the total number of words in all tasks in the job that were translated. At task level, it is the number of words in the task that were translated.
100% 99-75% 74-0%	During pre-processing, translation memory was applied to the task. These columns show how many words fell into each translation memory (TM) percentage match band. Repetitions are excluded from these totals.

These additional fields appear for each task in the **Cost Band Costing** table:

Field	Description
Base Cost	If the cost model includes a base cost for each language, the base cost amount is shown here.
Cost	Cost of translating this file into this language.
Cost Per Band	The columns here give a breakdown of translation costs.
Minimum Cost	The minimum cost is shown if the cost model includes a Minimum Cost and if the cost formula used in the configuration is the Standard Job Cost per Language Pair or similar. The default value for the minimum cost is set to 0 so that by default no minimum cost is applied.
PerfectMatch	Shows the translation cost for words translated by PerfectMatch.
100% 99-75% 74-0%	These columns show the cost of translating the words that fall into each translation memory (TM) percentage match band. Repetitions are excluded from these totals.
Repeated Cost	Cost of translating words in repeated segments. A value only appears here if you have defined a repeated word translation cost.
TM Saving	The amount of money saved by retrieving translations from the translation memory and applying PerfectMatch and repeated word costs.

MY JOBS SCREEN

The My Jobs screen displays jobs created by you. From here you can:

- Authorize jobs
- View and update jobs
- Download completed translations.

To display the **My Jobs** screen:

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the **My Jobs** option. The **My Jobs** screen is displayed.

My Jobs screen example:

Jack	Refr								
obs Fo	r Aı	uthorization		Au	thori	red	Jobs - In Progress (S	howing 7 Of 26)	
• D	Jo	b Name	Due Date	Jo	b Nar	ne		Due Date	
	÷	Sample 1	08/29/2016 16:13	•	Tran	slati	on job 1	08/30/2016 12:44	
D 🖸	Þ	Sample job	08/26/2016 14:31	×	Sam	ple	ob 2	08/29/2016 16:10	
• 🕄	Þ	Job 5	08/24/2016 16:55	•	Sam	ple	1	08/29/2016 16:09	
• 🕄	۲	Job 3	08/24/2016 16:49	•	Man	ual i	nput Project values	08/26/2016 16:40	
• 🕄	۶	Demo Three	01/29/2016 15:20		Auto	-ger	erate Project values	08/26/2016 16:38	
• 🕄	Þ	Song 2	01/29/2016 18:00	•	Sam	ple	3	08/26/2016 14:55	
				•	Sam	ple	2	08/26/2016 14:54	
			More					I	More
Jobs In	Exc	eption		Jo	bs Fo	r Do	wnload		
Job Nan	1e		Due Date	%	2	Jo	b Name	Due Date	
► My n	ew,	job	02/11/2016 17:19	۲	•	Þ	Sample job 2	08/29/2016 16:14	
				۲	÷	Þ	TMS-10063 Test 1	08/24/2016 16:40	
				0	<₽	Þ	My second job	08/23/2016 23:34	
				۲	•	•	PDF source file	03/14/2016 14:52	
				0	Ф	Þ	My new job	02/11/2016 17:19	
				٥	₽	۲	PM cand 4	02/03/2016 13:49	

The **My Jobs** screen has three panes:

- Jobs For Authorization lists jobs created by you that require authorization. When at least some of the tasks in the job are ready for authorization, you can link to the screen where authorization takes place.
- Authorized Jobs In Progress lists jobs that have been authorized and are currently in progress.
- **Jobs For Download** lists jobs for which there are some completed translations ready for downloading. You can go to the download screen from here.

Field Descriptions - Jobs For Authorization Pane



The jobs that appear here also appear in your SDL TMS inbox.

Field	Description
%	The icon in this column $\ \ \ \ \ \ \ \ \ \ \ \ \ $
	When this icon appears here, there are tasks ready for authorization. Click the icon to display the Authorization Summary screen. You can authorize tasks for all languages here or click a link in the Language Pair column to display the Authorization screen where you can see tasks in more detail before deciding whether to authorize them.
Job Name	Name that uniquely identifies a job. Click a job name link to display the job on the < Job name> - Details screen.
Due Date	Date by which all work on the translations should be completed.
More>>	Click this to display a complete list of all jobs with tasks awaiting authorization. This list is displayed on the Jobs Summary screen.

For more information about the **Authorization** and **Authorization Summary** screens, see *Authorizing Jobs* on page 3-1.

Field Descriptions – Authorized Jobs in Progress Pane

Job Name

Due Date More >>

Field	Description
Job Name	Name that uniquely identifies a job. Click a job name link to display the job on the < Job name> - Details screen.
Due Date	Date by which all work on the translations should be completed.
More >>	Click this to display a complete list of all jobs in progress.
Field Descriptions – Jobs For Field	Download Pane Description
	Description
%	The icon in this column indicates what percentage of the translations have been completed and are ready for downloading. Place the cursor over the icon to see the exact percentage. This version of the icon shows that all tasks in the job have reached this step.
•	Click the icon that appears in this column to display the Download Files screen. This is where you can see which files are ready for downloading and download them.

ready for downloading.

Name that uniquely identifies a job. Click a job name link to

Date by which all work on the translations should be completed.

Click this to display the **Jobs For Download** screen. This screen contains the complete list of jobs for which translations are now

display the job on the <**Job name> - Details** screen.

MANAGING JOBS

Editing Job Details or Linking Reference Material to the Job

- 1 Click the Projects navigation button. The Projects navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon [▶] that precedes the organization to which the job belongs.
- 4 Select the **Jobs** option. The **Jobs** screen is displayed.
- 5 Click the job name link to display the job on the <**Job name**> **Details** screen.
- 6 Click the Edit button. The <Job name>/Edit screen is displayed.
- 7 Make the required change(s):
 - □ To change the job name, edit the value in the **Name** box.
 - □ To update the job description, edit the value in the **Description** box.
 - If you want to change the privacy status of the job, select the **Private** box.
 - If you want to change the job due date, select the **Due Date** icon, to display the calendar.
 Select the new due date and click this Select the calendar.
 - □ If you want to link reference material to the job, select the files in the left hand box of the **Reference Material** field and click the right arrow.
- 8 Click the **Submit** button to save the change(s).

Updating Dynamic Cost Variables

- 1 Click the Projects navigation button. The Projects navigation tree is displayed.
- 2 Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon [▶] that precedes the organization to which the job belongs.
- 4 Select the **Jobs** option. The **Jobs** screen is displayed.
- 5 Click the job name link to display the job on the **<Job name> Details** screen.

- 6 Click the Edit Add Costs link in the Job Summary part of the screen. The <Job name>/Edit screen is displayed on the Add Costs tab.
- 7 Complete the **Unit Cost** box for the first variable by entering the amount of the variable.
- 8 Complete the **Quantity** box for the variable by specifying how many times the variable amount should be added to the cost formula.
- **9** Repeat steps 2 and 3 for any further variables.
- **10** When you have finished, click **Submit**.
- 11 Click the **Back** button to return to the **<Job name> Details** screen.

Viewing Job Source Files

You can view the source file submitted for translation. Each file is an Item in SDL TMS.

- Click the Item Count link in the Job Summary part of the screen. The Items screen is displayed. This screen lists the source files that were submitted for translation.
- 2 Click a link in the Filename column to display the file in a browser.

Viewing Job Costs in Detail

You can view a detailed breakdown of translation costs, by language pair, on the **Cost Banding** - **Language Pair** screen. This screen is displayed when you click a language pair link in the **Linguistic Analysis** table of the **<Job name>** - **Details** screen.

Downloading Files

Click the **Download** button on the **<Job name> - Details** screen to display the **Download** screen. From here you can download: ITD files, SDLXLIFF files, source files, reference files, completed translations and translation memories.

To download files:

- 1 Click the **Download** button on the **<Job name> Details** screen. The **Download** screen is displayed.
- 2 Select the file(s) to be downloaded (tick the **Select** box for each one).
- **3** Click the **Download** button. The selected files are compressed into a single .zip file for downloading. An information message is displayed when the .zip file is ready.



NOTE

If the zip process is taking a long time, you can exit this screen and download the file later from the **My Downloads** screen. To display the **My Downloads** screen, select the **My Downloads** option from the **Home** navigation tree.

- 4 Click the . zip file name link in the information message to download the file:
 - If you are using Microsoft Internet Explorer, the File Download dialog box is displayed. Click Save. The Save As dialog box is displayed. Navigate to the folder where you want the . zip file to be placed and click Save. The download now takes place.
 - □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.
- 5 Click the **Info** button to close the information message containing the download link.

If reference material has been linked to the job, you can download it by clicking the filename link in the **Reference Material** field of the **<Job name> - Details** screen.

Downloading Completed Translations

Completed translations are downloaded from the **Download Files** screen. This screen can be accessed from either the **<Job name> - Details** screen or the **My Jobs** screen. To display the **Download Files** screen:

- □ On the **<Job name> Details** screen, click the **Download** button.
- On the My Jobs screen click the Download Files icon ¹/₂ in the Jobs for Download part of the screen. If this part of the screen is empty, there are no completed translations ready to download.

Download Files screen example:

Sample 1 > Download Files										Θ
Back	G Refresh	B Info	Download	Submit						
	Page		Actio	es						
III Re	ference Ma	terial								
There	are no recor	ds to dis;	play.							
Tra	anslated File	s								
U	anguage Pa	ir			-	Tasks Ready		Task Count		
A	All				•					
€ E	N-US>EL						1			1
R, E	N-US>ES						1			1
@\E	N-US>IT						1			1
0							3			3

Select the files to download and click the Download button.

Translated files can be downloaded as many times as you want. They remain available for downloading from this screen until you submit the tasks to the final workflow step. You should routinely **Submit** tasks that you have finished with. Jobs and tasks cannot be archived until they reach the final workflow step.

When you Submit a task, it is removed from the Download Files screen.

Downloading Translated Files

- 1 Tick the **Select** box for each file to be downloaded.
- 2 Click the **Download** button. The selected files are compressed into a single . zip file for downloading. An information message is displayed when the . zip file is ready.



If the zip process is taking a long time, you can exit this screen and download the file later from the **My Downloads** screen. To display the **My Downloads** screen, select the **My Downloads** option from the navigation tree.

- 3 Click the file name link in the information message to download the zip file:
 - If you are using Microsoft Internet Explorer, the File Download dialog box is displayed.
 Click Save, the Save As dialog box is displayed. Navigate to the folder where you want the . zip file to be placed and click Save. The download now takes place.
 - □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.
- 4 Click the **Info** button to close the information message containing the download link.

If reference material has been linked to the job, you can download it by clicking the filename link in the **Reference Material** field of the **<Job name>** - **Details** screen.

Submitting Files that You Have Finished Downloading

- 1 Tick the **Select** box for each file that you have finished downloading.
- 2 Click the **Submit** button.
- **3** In the information message displayed, click **Yes**. The tasks are submitted to the final workflow step.
- 4 Click the link to go to your inbox.

Downloading Translation Memories

You will only be able to download translation memories (TMs) if your system has been set up to export TM data to ZIP files for downloading. Translation memories are downloaded from the **Download Files** screen and also from the **Exported TMs** screen. To display the **Exported TMs** screen, click the **Download TMs** button in your Inbox.

When downloading translation memories from either the **Download Files** screen or the **Exported TMs** screen:

- □ Make sure that you select the correct language pair. Each translation memory download file is language specific. The language pair appears as part of the file name.
- Make sure that you select the correct file type for downloading: SDLTM, MDB or TMX. SDLTM files are used in SDL Trados Studio, TMX files may be used in SDLX and SDL Trados, MDB is a Microsoft Access file for use in SDLX.

How to Download a Translation Memory

This procedure describes how to download translation memory data from either the **Download Files** screen or the **Exported TMs** screen.

- 1 Identify the translation memory file or files to be downloaded. Make sure that you choose the correct language pair and the correct translation memory type (SDLTM, MDB orTMX).
- 2 Select the translation memory files and click the **Download** button. The selected files are added to a ZIP file. When the ZIP file is ready, an information message containing the ZIP file name is displayed.
 - □ If the process of zipping the files is taking some time, you can exit this screen and download the file later from the My Downloads screen. To exit this screen without stopping the zip process, select an option from the navigation tree.
- 3 In the message, click the ZIP file name. The **File Download** dialog box is displayed.
- 4 Click Save. The Save As dialog box is displayed.
- 5 Navigate to the location where you want to save the ZIP file and click Save.
 - If you are using Mozilla FireFox, select the **Save to Disk** option and click **OK**.

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Deactivating a Job

If you want all work on a job to cease, you can deactivate it. When you deactivate a job, the job still appears in the navigation tree and you can still view the job details but all work on the job ceases and nothing further can be done with the job. The job details will remain visible on screens until they are removed by the next Archiving run.



NOTE

Once a job has been archived, it cannot be deleted.

To deactivate a job:

- 1 Click the Edit button on the <Job name> Details screen. The <Job name>/Edit screen is displayed.
- 2 Click the Deactivate Job button. A confirmation dialog box is displayed.
- 3 Click Yes.



You can also deactivate a job from the **Job Summary** screen by selecting the job and clicking the **Deactivate Job** button.

Deleting a Job

If you want to delete a job, you must deactivate it first. Deleting the job immediately removes all trace of the job from the system.

- 1 Click the Edit button on the <Job name> Details screen. The <Job name>/Edit screen is displayed.
- 2 Click the **Deactivate Job** button. A confirmation dialog box is displayed.
- 3 Click Yes.
- 4 Click the **Delete** button. A confirmation dialog box is displayed.
- 5 Click Yes.



You can also delete a job from the **Job Summary** screen by selecting the job and clicking the **Delete** button.

MANAGING TASKS

Tasks are the translation tasks to be performed for a job. Each file submitted for translation generates a translation task for each target language in a job. For example, if a job contains five files for translation into four target languages, this would generate 20 tasks.

Checking Task Status

The **Task Status Summary** screen displays tasks for a single language pair and shows you which workflow step the tasks have reached, who is working on the tasks, whether the tasks have special priority and the cost of translating the tasks. The **Task Status Summary** screen is displayed when you click a link in either the **Language Pair** column or the **Workflow Step** column of the **Step Status** table of the **<Job name> - Details** screen:

- If you click a Language Pair link, the screen displays all tasks for the language pair.
- If you click a **Workflow Step** link, the screen displays all tasks at the selected step for the language pair.

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There is only one field on this screen that does not appear on the **<Job name>** - **Details** screen:

Field Description

Priority status. If the task has been assigned a special level of priority, the priority status icon appears in this column:

= High priority

Low priorityBlank = Normal priority.

Viewing Task History

The **Task History** screen shows the workflow step history for the task. It shows which steps have been completed, which one is currently in progress and which steps have yet to be performed (are pending). For each step, information about the success of the step is given, as well as an error code that identifies the step outcome. This is useful if the step failed and you need to ask your SDL TMS system administrator to investigate.

Both human and system workflow steps are displayed.



The Task History screen is not available to vendors and vendor users.

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Task History screen example:

Date (Time)	User	Previous Workflow Step	Action	Workflow Step	Severity	Description	Comment	System
	Al	•	Al 💌	AI	Al 💌]		Al
01/29/2016 13:34:50	System		Start	Start	Success	Even/thing was OK.		~
01/29/2016 13:34:50	System		Submitted To	Pre-processing	Success	Everything was OK.		~
01/29/2016 13:34:51	System		Starting	Pre-processing	Informational	Step execution starting.		~
01/29/2016 13:34:51	System		Information	Pre-processing	Informational	Applying the TM using a TM match penalty.	TM [Demo TM] TM Penalty [0%]	~
01/29/2016 13:34:51	System		Step Result	Pre-processing	Success	Everything was OK.		~
01/29/2016 13:34:51	System	Pre-processing	Submitted To	Authorization	Success	Everything was OK.		×
01/29/2016 13:35:02	System Administrator		Step Result	Authorization	Success	Even/thing was OK.		×
01/29/2016 13:35:02	System Administrator	Authorization	Submitted To	PJM Authorization	Success	Everything was OK.		×
01/29/2016 13:35:18	System Administrator		Step Changed	Translation	Success	Everything was OK.		×
-	Jon Snow		In Progress	Translation				×
	System		Pending	Rebuild Translation				~
	John Don		Panding	Annerual				~

This is how the screen appears by default. You can add more columns to the table if you want.

Task history screen field descriptions:

Field	Description
Date (Time)	Date/time the action took place. If you sort the entries on this screen by date/time, you see the steps in the order in which they occurred.
User	The name of the person (or Group) performing the workflow step named in the Previous Workflow Step column. If the step was an automated step, the word System appears here. You can filter the information on this screen by selecting a value from the drop-down list in this box. For example:
	Select Human to display only those steps performed by people.
	Select System to display automated steps only.
	Select a person's name to display steps performed by that person only.
	Click a user name link to display the Workload screen for the user.

Previous Workflow Step	Step colu	that occurred immediately prior to the step in the Workflow mn. The name in the User field tells you who performed this it was a system step.
Action		displayed here indicates activity for the step displayed in the Step column:
		Submitted – the task was submitted to the next step.
		Rejected – the task was rejected.
		Terminated – the task was terminated.
		Reassigned – the task was reassigned to another user.
		Step Changed – the task was moved to another workflow step by a user.
		Step Result – shows the outcome of activity in a system step.
		Download – the ITD file was downloaded.
		Upload – the ITD file was uploaded.
		Information – further information about the action.
Workflow Step	Workflow	step name.
Module		which SDL TMS module was involved in the processing. This on is of use to the system administrator.
Severity	The value	here indicates the outcome of the process:
		Success – the activity was completed successfully.
		Warning – warning that something is not correct in your setup. For example, this could be a warning that you are using a workflow that includes a cost calculation step but you have not defined any translation cost figures. The task will be processed but the time taken to check for the presence of costing figures is a waste of time.
Error Code		t indicates the outcome of the action. This information is of e system administrator.
Description	Message	text that explains the outcome of the action.
Server		TMS installation may use more than one physical server r. This column shows the name of the server where this action essed.

Comment	Supplementary information. For example, it might contain a terminology server name when describing the outcome of a terminology activity.
System	Filter the entries on the screen to show or exclude system steps:
	Yes – show system steps only.
	No – show human steps only.
	All – show human and system steps.

Checking a User's Task Loading

The **Workload** screen displays the tasks currently in a user's inbox and the tasks scheduled to come to the user in the future (when other users have completed their steps). You can also reassign tasks to other users from here. **Workload** screen example:

Demo Organization) ▶ Users & O	Groups 🕨 Use	rs ⊧ Sam Smith ⊧	Wo	rkload					
Back Refresh	Reassign									
Page	Action									
III Workload - Sam Sm	ith (ssmith@g	mail.com)								
Organization	Job		Language Pair	٠	Workflow Step		Word Count	Task Count	Due Date	Status
Demo Organization 💌			All	٠	All	٠				
Demo Organization	Song 2		EN-GB > PT		Translation		99		1 02/09/2016 15:00	Pending
Demo Organization	Demo Three		EN-GB > PT		Translation		258		1 02/09/2016 15:00	Pending
Demo Organization	Multiple Task	s 2	EN-US > ES		Translation		99		1 -	In Progres
Demo Organization	Multiple tasks		EN-US > IT		Translation		140		2 -	In Progres
Demo Organization	Reference Ex	ample	EN-US > IT		Translation		107		1 -	In Progres

Field descriptions:

Field	Description
Workload - user name	In the bar that appears above the table containing the user's tasks, the user's name and contact details are displayed.
Organization	Organization for which the job is being performed.
Job	Job that contains a task (or tasks) assigned to this user.
Language Pair	Task language pair.
Workflow Step	Action a user is expected to perform on the task (e.g. translation). Click a link here to display the tasks on the Task Status Summary screen.
Word Count	Number of words in the task(s).
Task Count	Number of tasks.
Due Date	If a due date/time for completing the task(s) has been specified, it is displayed here.
Status	Task status: In progress - the task is in the user's inbox Pending - the task will come to the user in the future, after other steps have been completed.

Project If the task is part of a project, the project name appears here.

Project Code If the task is part of a project, the project code appears here.

There are two ways to display the Workload screen

- From the **Users/Edit** screen.
- From the **<Job name> Details** screen.

You would probably use the first method if, for example, a translator is sick and you want to see how that will impact on deadlines. The second method is useful when you are already on the **<Job name>** - **Details** screen and want to know if a step is late because the person assigned to the step has too much work.

Displaying the Workload Screen from the Users/Edit Screen:

- 1 Click the Setup navigation button. The Setup navigation tree is displayed.
- > NOTE

The Setup navigation button is only available if you have the appropriate permissions.

- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click ID to expand the Users & Groups option on the navigation tree.
- 4 Select the **Users** option. The **User/Edit** screen is displayed.
- 5 Click on the user name in the **Name** column.
- 6 Click the Workload icon. The Workload screen is displayed.

Displaying the Workload Screen from the <Job name> - Details Screen:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon preceding the Jobs option. All jobs are listed in the navigation tree.
- 4 Select a job. The **<Job name> Details** screen is displayed for the selected job.
- 5 Click the user's name link in the Users Assigned column of the Step Status table. The Workload screen is displayed for the selected user.

7

Reassigning Tasks from One User to Another

You can reassign tasks from one user to another user or to a number of users:

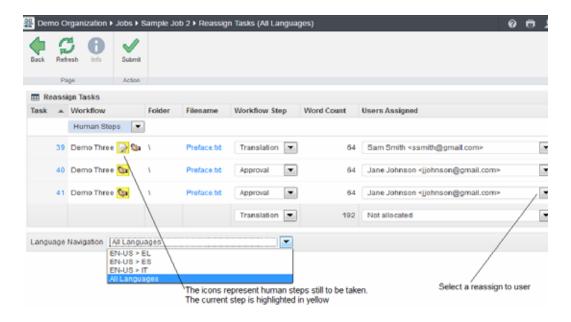
- □ You can reassign tasks that are currently in the user's inbox and tasks that are scheduled to come to the user in the future.
- □ You can reassign each task to a named user or group, or leave it Unallocated (for assignment in the future).
- □ You can view and reassign tasks for all languages at the same time or you can reassign tasks for one language pair at a time.

When you reassign tasks these things happen automatically:

- □ The tasks are immediately removed from the current owner's inbox and placed in the new owner's inbox.
- Both users are notified of the change by email.

Tasks are reassigned on the **Reassign Tasks** screen. To display this screen, click the **Reassign** button on either the **<Job name>** - **Details** screen or the **Workload** screen.

Reassign Tasks screen example:



The screen lists tasks for a single language pair.

Field	Description
Task	Task ID. Number that identifies the task.
Workflow	Contains the name of the workflow being used to process the task and icons representing the human workflow steps still to be completed. The current step is highlighted in yellow. Select an icon to display the name of the person assigned to the step in the Users Assigned column.
Filename	The original file submitted for translation.
Workflow Step	By default, this shows the name of the current workflow step. If you want to select a different step, click the down arrow.
Word Count	Number of words in the task.
Users Assigned	This box displays the name of the user assigned to the selected workflow step for this task. To select a different user, click the down arrow and select a name from the drop-down list.
Language Navigation	To see all tasks for all languages, select All Languages from the from the drop-down list. To reassign tasks for a single language pair, select the language pair from the drop-down list.

Reassigning Tasks

Before you start:

You must be currently be working on either the <Job name> - Details screen or the Workload screen.

- 1 Click the **Reassign** button. The **Reassign Tasks** screen is displayed.
- 2 In the Language Navigation box, specify which tasks you want to display for reassigning:
 - □ To see all tasks for all languages, select **All Languages** from the from the drop-down list.
 - □ To see tasks for a single language pair, select the language pair from the drop-down list.
- **3** Select the workflow step to be reassigned. Click the step icon or select the step from the list in the **Workflow Step** box.
- 4 Select the reassign-to user from the drop-down list in the **Users Assigned** box.
- 5 Click the **Submit** button to make the change.



- □ You can also make several changes and submit them all at the same time.
- If you have made changes to the currently displayed tasks, you must **Submit** these before selecting a different language pair.

Modifying Task Status

You can modify the current status of a task by:

- Moving it to another workflow step.
- Terminating the task.
- Reactivating a terminated task.

For example, you could move a task currently at the Translation step directly to Approval or you could move one back from Approval to Translation. You can terminate tasks, so that no further activity takes place on the task and you can reactivate a task that was terminated.

When you save a task status change, the change is effective immediately and these things happen automatically:

- Tasks are removed from the current owner's inbox and placed in the new owner's inbox.
- Both users are notified of the change by email.

Task status is modified on the **Modify Step** screen. To display this screen, click the **Modify Step** button on the **<Job name> - Details** screen.



NOTE

There is one 'system' step available for selection when modifying task status: Translated Content Retrieval. In this step, translated text is combined with the other elements of the original file to produce a localized version of the original file for downloading. This is the final product. This step should only be selected if you are uploading files where this work has been done offline.

Modify Step screen example:

🖨 De	no	Organization	Jobs I Multiple Ta	isks I Modify Step (Ef	N-US≯IT)			0	Θ	1
Back		efresh Info	Submit							
		Page	Action							
⊞ M	xdif)	y Step								
Task	٠	Filename	Users Assigned	Word Count	Workflow		Workflow Step			
					Human Steps	۲				
	42	Summary.txt	Sam Smith	76	Demo Three 🔒 📝 🗞 😸 🕱		Translation			٠
	43	Preface.txt	Sam Smith	64	Demo Three 🔒 📝 🗫 🗟 🕱		Translation			٠
				140			Autherization			٠
				workflow step	represent the human o for each task. step is highlighted in vellow.	Sé	lect a new step.			

For descriptions of the fields on this screen, see the **Field Descriptions** for the **Reassign Tasks** screen, as they are the same.

Moving a Task from One Workflow Step to Another or Terminating the Task

- 1 Display the **<Job name> Details** screen for the job containing the task.
- 2 Click the Modify Step button. The Modify Step screen is displayed.
- **3** Locate the task to be modified:

If tasks for the wrong language pair are currently displayed, select the correct language pair in the **Language Navigation** box.

- 4 Select the new workflow step. Click the step icon or select the step from the list in the **Workflow Step** box.
 - If you want to terminate the task, select the **Terminated** icon 🗙
- 5 Click the **Submit** button to make the change.

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- $\hfill\square$ You can make several changes and submit them all at the same time.
- If you have made changes to the currently displayed tasks, you must **Submit** these before selecting a different language pair.

Reactivating a Terminated Task

Follow the procedure described above for modifying the task status. When you select the new workflow step, select the step at which you want the task to resume processing.

HANDLING TASKS THAT FAIL

When a task fails to process correctly it is sent to one of two special workflow steps: Exception or Recovery. The failed task is placed in the inbox of the user who is assigned to that step (for the language pair) and the user is notified by email that the task has been placed in their inbox.

There are three reports that provide information about tasks that are currently in Exception or Recovery or were sent to those steps at some point:

- Files in Exception
- Files in Recovery
- Recovery and Exception Summary.

These reports are all in the Management Reports group on the Reports screen.

Dealing with Tasks in Exception

Tasks that fail because of an identifiable error (a problem with a broker script or the source file for example) are sent to the **Exception** workflow step. In your Inbox, you can easily see which tasks have been sent to the **Exception** step as the step name appears in the **Workflow Step** column.

			Downsel	Anna an		113	C) upShare nate			
	Page	Adams	C Plan C		2vda	CH	uplitare			
m .	Index View									
	Organization	* Job		Task Count	Workflow Step		Language Pair	New	Word Count	Tasks Ass
	AL				Exception	•	NI			
0	Demo Organization	Sample job	2 \	1 50	Exception		ENI-GB > PT	0		
23			1	20				7,755	16,588	
			This task	is in Exception						

If you are responsible for the **Exception** step, you can view the reason for the error on the **Task** - **Exception** screen and then take whatever action is needed to fix the problem. For example you may need to upload the task source file again or a resource used by a broker script or a locally edited version of the ITD file. Alternatively, you may decide the delete the job containing the task and add it again.

Information about why a task failed is given on the **Task - Exception** screen. This screen also contains options for correcting the problem and restarting the task. When you select an **Exception** task from your **Inbox (Tasks)** it is automatically displayed on the **Task - Exception** screen.

The Task - Exception Screen

The **Task - Exception** screen displays a detailed breakdown of the task's processing history, the reason why the task failed and suggestions for resolving the problem.

Exception De	etaite .							
The last has	tailed arr	an existin	m .					
Plane Is the	-	that caused	the aniaphon and	upload the out	rested the			
Once Reed, It	ha taili ca	the submitte	ad from your integ	or by sliding t	he Bubmit button ab	ove. Note that if the teel has not been properly fixed. If will remain in your inbox, and you will rede	ive another mail	
New versions the Muchly S			et files cart be up?	eaded by dida	g the Source Uploa	of or Target Upload' builtons above. The task can also be moved to another volifion also by select	ng the stati ballow and	aliding.
Exception Sc	manary :							
Errol Code			RDL	LINE_PPT_NGS	LID_BRELANG			
Reason for F	alute:		The o	aurce language	of the bilingual file	does not match the source language of the job		
Supprsted S	-	·	Chan	pe the source i	anguage of the follow	paal file and re-national the jok		
Report lash	History							
Date (firms)	liteer .	Autors .	Workfreet Step	Severity	Description	Comment	Server Name	System
02:04:2016 14:21:05	Syden	tisting	Extract Translateble Content	International	The encodor starting		CLU/THSTW24801	×
80.04/2016 14/21 88	System	New Tread	E stract Nanalatative Content	true	The bilingual file source language did not install the BDL TMS scorce language for this task.	TensProcessEnsanglow: Dask revised to exception. Set Sins Pyt. at Set Tens Pyt.tel?pt.Entensity at Set Tens Pyt.tel?pt.Entensity.com/met/2125aakbit, at Set Tens Tender/OF Informations.com/met/2126aabbit Set Tens MessageProcessing Worker/RequestProcessor EvendeRessage()	CLUTHESTROSOS	×
0204/2016 14/21 96	Ayaham	Exception	Extract Survisions Content	Error	The bilingual file source language did not exall the BDL TMS source language for the task.	Error Code (SDL_SHR_PPT_HVALID_SHCLUNIC) Script Network (The source Language of the inlingual file does not match the source Language of the JobJ, Resolution (Classipe the source language of the billingual file and re-solenit the JobJ	CLUTHESTWORDER	8
0204/2018 14/21/00	System	Submitted To	Ecopton	Succes	Everyming west OK		CLUITMETW2K881	×
82/64/2016 16/21/08	System	Exception	Exception	Exceptor	Task raised to exception.	Text failed with IDL_ERM_RPT_MOLO_MICLAND. The source tanguage of the bilingual file does not match the source tanguage of the job Change the source tanguage of the bilingual file and in a source file job.	CELLITHERWOKEH	×
Muddy Step								
Filmane		methow				Workflow Bep		
chain and			03435	06.00	1 H 14 34	Extrain Transmission Contant		

From the Task - Exception screen you can:

- □ Submit the task (the task resumes processing at the step that originally failed).
- Upload a new task ITD created off-line. The new ITD can be moved to a particular workflow step or you can submit it to the next workflow step.
- **Open the task on the Translation Interface** where you can see the task contents and preview
- the task in the browser.
- Deactivate and terminate the job.

How to Display the Task - Exception Screen

1 If you are in the **Inbox View**, locate a job that contains tasks in **Exception** and click the icon in the **Task Count** column. The **Inbox View (Tasks)** is displayed.

2 In the Inbox View (Tasks), locate a task in Exception and click the link in the Filename column. The task is displayed on the Task - Exception screen.

How to Handle Tasks in Exception

- 1 Display the task on the **Task Exception** screen and establish why the task failed:
 - Read all entries in blue. The entries tell you where in the workflow the exception occurred and why the exception occurred.
 - □ Click the **Task History** button to display the **Task History** screen where you can see a detailed breakdown of the processing history for the task.
 - Click the **Translation Page** button to open the task on the **Translation Interface** where you can preview the file.
- **2** Correct the problem. It may be necessary to talk to the system administrator to understand why the task failed and to correct the problem.
 - If you need to upload a new version of the task, click the **Target Upload** button.
 - If you need to upload the source file for the task, click the **Source Upload** button.
- **3** When the problem has been corrected you must restart the task. You can restart the task by repeating the step that originally failed or you can move the task to a different step and restart it.
 - □ To restart the task by repeating the step that originally failed, click **Submit**. If the problem has been corrected the step will complete successfully and the task will move to the next workflow step.
 - □ To restart the task at a different workflow step, select the step in the Workflow Step box (under Modify Step) and click Submit.
 - □ To terminate the task, select the **Terminated** step in the **Workflow Step** box (under **Modify Step**) and click **Submit**.

How to Edit, Deactivate or Delete the Job

- 1 Display the job on the Job-name Details screen.
- 2 Click Edit. The Job-name/Edit screen is displayed.
 - If you want to edit the job details, make the change and click **Submit**.
 - □ If you want to deactivate the job, click **Deactivate Job**. A confirmation dialog box is displayed. Click **Yes**.
 - If you want to delete the job. First deactivate the job and then click **Delete** to delete it.

Dealing with Tasks in Recovery

Tasks that fail because of an unknown problem are sent to the **Recovery** workflow step. If you are responsible for the **Recovery** step, you have to find out why the task failed, correct the problem and restart the task. You may have to contact the SDL TMS support team for more information about the problem, its cause and solution.

Once the problem has been corrected, you can submit the task from your inbox. If the problem has been resolved, the task will resume processing at the point where it originally failed.

In your Inbox, you can easily see which tasks have been sent to the **Recovery** workflow step as the step name appears in the **Workflow Step** column.

		2		Devertised Uplant	And	a harrist	Grouptive					
	Pege.	A	clene (Film	2494		GroupSA					
	Index View											
2	Organization		Job		Task Coust	Workflow Step	Ø	Language Pair		New	Word Count	Tasks Ar
	All					Recovery		AL.	•			
13	Demo Organization		Bample (st	6)	1 B	Recovery		EN-G8 > PT				2))
23					20					7,755	35,588	12

When you select a task in **Recovery** from your inbox it is automatically displayed on the **Task** - **Recovery** screen.

The Task - Recovery Screen

The reason why the task failed can be seen on the Task - Recovery screen.

Recent Task His	alory.		eches can be up	loaded by clico	ng the Source	Upload or Target Upload buttons above. The task can also be moved to another workflow step by selecting the ste
	ser Act	00	Workflow Slep	Severity	Description	Contanient
12/04/2016 St	ystem Sub	mitted	Pre-processing	Saccese	Everything was OK	
12/04/2016 S) 15:04:43 S)	ystem Star	5ng	Pre-processing	Informational	titep execution starting	
12:04:2018 Sj 15:05:04 Sj	ystem Step Res		Pre-processing	Kreie	An exception occured.	He Type SupportException: Unable to open Excert like - it may be password protected; : Set.File/Type SupportEites SetU in Type SupportEiters.ExcelExcelledgesConvertEitcertExcelEning feetbares, Simg output likeling, ISE2 of SetU in Type SupportEiters.ExcelFerTematics.Thread likeling Feetbares, Simg output likeling, ISE2 of SetU in Type SupportEiters.ExcelFerTematics.Thread likeling Feetbares, Simg output likeling, ISE2 of SetU in Type SupportEiters.ExcelFerTematics.Thread likeling Feetbares SetU in Type SupportEiters.ExcelFerTematics.Thread likeling Feetbares SetU in Type SupportEiters.Thread likeling Feetbares SetU in Type SupportEiters.ExcelFerTematics.Thread likeling Feetbares SetU in Type SupportEiters.Thread likeling Feetbares SetU in Type SupportEiters.Thread likeling Feetbares.Thread likeling feetbares SetU in Type SupportEiters.Thread likeling Feetbares.Thread likeling feetbares SetU in Type SupportEiters.Thread likeling for the State SetU in the SetU in the Type SupportEiters.Thread likeling SetU in Type SupportEiters.Thread likeling for the SetU in
	Sub	milled	Recovery	Duccese .	Even/thing was OK	
12/04/2016 (b) 15:05:13 (b)	ratem To					

The problem that caused the task to fail may have to be corrected outside SDL TMS. However, from the **Task - Recovery** screen you can:

- □ Submit the task (the task resumes processing at the step that originally failed).
- Upload a new task ITD created off-line. The new ITD can be moved to a particular workflow step or you can submit it to the next workflow step.
- Select a workflow step and move the task to that step.
- Open the task on the Translation Interface where you can see the task contents and preview the task in the browser.
- Deactivate and terminate jobs.

How to Display the Task - Recovery Screen

- 1 If you are in the **Inbox View**, locate a job that contains tasks in **Recovery** and click the icon in the **Task Count** column. The **Inbox View** (**Tasks**) is displayed.
- 2 In the Inbox View (Tasks), locate the task in **Recovery** and click the link in the **Filename** column. The task is displayed on the **Task Recovery** screen.

How to Handle Tasks in Recovery

- 1 Display the task on the Task Recovery screen and establish why the task failed.
 - Read all entries in red. They tell you where in the workflow the task failed and why it failed.
 - Click **Task History** to display the **Task History** screen where you can see a detailed breakdown of the processing history for the task.
 - Click **Translation Page** to open the task on the **Translation Interface** where you can preview the file.
- **2** Correct the problem. It may be necessary to talk to the system administrator to understand fully why the task failed and to correct the problem.
 - If you need to upload a new version of the task, click the **Target Upload** button.
 - If you need to upload the source file for the task, click the **Source Upload** button.
- **3** When the problem has been corrected you can either **Submit** the task or move it to another workflow step where it resumes processing:
 - □ If you want the task to repeat the step that originally failed, click **Submit**. If the problem has been corrected the step will be completed successfully and the task will move to the next step.
 - □ If you want the task to resume processing at a different step (to the step that failed), move the task to the required step. To move the task to a particular step, select the step in the **Workflow Step** box (under **Modify Step**) and click **Submit**.
 - □ To terminate the task, select the **Terminated** step in the **Workflow Step** box and click **Submit**.

MANAGING VENDORS

A vendor is a localization service provider. If you regularly use vendors to perform your translations, the vendors can be added to SDL TMS and can be assigned to workflow steps. Vendors have limited access to SDL TMS and can only see information about themselves and the tasks they are performing.

Managing tasks within a job that are assigned to a vendor works in a similar way to managing a job that does not include vendors. Jobs which include vendors can still be viewed on the **<Job Name>** - **Details** screen where you can monitor their progress and view their costs. When a vendor is assigned to a task, part of the management of the task is performed by the vendor project manager. For example, they can authorize the task during the **PJM Authorization** step and if the **Translation** and **Review** steps are to be performed by the vendor, the vendor project manager is able to reassign those steps to different vendor users within their company.

> NOTE

If you delete or reassign users for a job that contains tasks assigned to the vendor, you must notify the vendor as work may have already commenced on that task.

You can manage vendors in the following ways:

- Create a job that includes a configuration that is vendor-enabled. For more information, see *Vendors Tab Description* on page 2-18.
- Authorize work to be assigned to a vendor. For more information, see *About Authorization and PJM Authorization* on page 3-2.
- Monitor the tasks assigned to the vendor on the **<Job Name> Job Details** screen.
- Run the Vendor Summary Report. This gives you a brief overview of the vendors that currently belong to your organization. For more information, see *Vendor Summary Report* on page 11-42.

WORKING WITH STUDIO PACKAGES

SDL Trados Studio is a translation tool from SDL. It uses packages to exchange work with project team members. If you are project managing in SDL TMS, then downloading and uploading packages allows you to work directly with project team members who are translating and reviewing in SDL Trados Studio.

A Studio package contains all of the files and information that a translator or reviewer using SDL Trados Studio needs to translate or review files. This eliminates the need to send multiple files or multiple emails and enables all job information to be sent with job files in a coherent structure. Studio packages are created in SDL TMS when you choose to download a Studio package.

Files translated or reviewed in SDL Trados Studio can be placed in a return package and uploaded to SDL TMS: you upload the return package to SDL TMS and then submit the translated or reviewed files to the next step of the workflow.

Performing translations and reviews in Trados Studio

SDL Trados Studio is the centralized workplace for translators and reviewers. Starting with TMS II.3, users can access their TMS Inbox from within Trados Studio, thanks to the **Commute** plug-in, available in the **My downloads** screen. To benefit from this functionality, they must first install the plug-in on their desktop, add their TMS server to their Studio instance and then perform the work in Trados Studio.

Downloading a Studio Package

When you choose to download a Studio package, SDL TMS creates a .zip archive containing:

- Job Details.
- ITD or SDLXLIFF Source Files for translation or review.
- Project Translation Memory.
- MultiTerm Server Termbase location.
- Reference Materials.
- Any custom file type setting.
- Any custom QA Checker settings from the Studio Project Template used to create the package.

> NOTE

A project translation memory is automatically created for all new jobs. If no project translation memory is available for a job, one of the following must be true: The workflow used to process the job does not contain the **ApplyTM** step. All of the words in the job are new (they do not exist in a translation memory). The Archiver service has stopped on all SDL TMS servers. For more information, see the SDL TMS Administrator Guide.

To download a Studio package:

- 1 Click the **Home** navigation button. The **Home** navigation tree is displayed.
- 2 Select the Inbox option from the navigation tree. The Inbox View screen is displayed.
- **3** Select the tasks to include in the package:
 - If you want to include all of the tasks in a job in the package, tick the **Select** box for the job on the **Inbox View** screen.
 - □ If you want to select individual tasks from a job, click a link in the **Task Count** column on the **Inbox View**. The tasks in the selected job are displayed on the **Inbox View** (**Tasks**) screen. Tick the **Select** box of each task to be downloaded.
- 4 Click the **Download** button. An information message listing items available for downloading is displayed.
- 5 Select **Studio Package** and clear any other checkboxes that are currently selected.
- 6 Click Download. The following information message is displayed as the files are compressed into a single . zip file. This zip file may contain several packages (*.sdlppx) if you are downloading tasks from different jobs.
- 7 When the zip file is ready for downloading, a new information message is displayed.
- 8 Click the file name link in the information message to download the zip file:
 - □ If you are using Microsoft Internet Explorer, the **File Download** dialog box is displayed. Click **Save**. The **Save As** dialog box is displayed. Navigate to the folder where you want the . zip file to be placed and click **Save**. The download now takes place.
 - □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.
- 9 Click the **Info** button to close the information message containing the download link.
- **10** The zipped package can now be sent to the appropriate team member for translation or review. Once the translator or reviewer has completed their work the files will be returned to you in a return package.

If the selected files are taking a long time to zip, you can exit this screen without canceling the zip process and then download the .zip file later from the **My Downloads** screen.

Uploading a Return Package

SDL Trados Studio users return the translated or reviewed ITD or SDLXLIFF files in a Studio return package (*.sdlrpx). These files can then be uploaded into SDL TMS and submitted to the next workflow step. When you upload an ITD or SDLXLIFF file, it immediately replaces the one that is held in SDL TMS and can be submitted to the next workflow step.

A return package only contains the translated or reviewed ITD or SDLXLIFF files.



NOTE

You can upload return packages that contain only some of the files from the package that was initially sent out. For example, if you send a package containing five files for translation and the return package contains three of the translated files, then you can upload the return package just with those three files. The outstanding files can be uploaded at a later time in another return package.

To upload a return package:

- 1 Click the Home navigation button. The Home navigation tree is displayed.
- 2 Select the **Inbox** option from the navigation tree. The **Inbox View** screen is displayed.
- 3 Click the Upload> Task Upload. The Task Upload screen is displayed.
- Either perform a drag-and-drop operation or click inside the Upload Task area, navigate to the folder containing the return package (*.sdlrpx for Studio return package), select it and click Open. The file name appears below the Upload Tasks area. You can also zip a package and upload it.
- 5 Select the Automatically submit bilingual files when successfully uploaded box if you want the uploaded tasks to automatically replace the existing tasks for that job and be submitted to the next workflow step.
- 6 Click the Start Upload button. The tasks are now uploaded. A report of the success or failure of the upload is displayed on the Task Upload screen.

REFERENCE MATERIAL

Reference material consists of files that have been uploaded to SDL TMS, usually in support of a particular job or project. Reference material is not translated, the files are there to help the people who are working on the job or project translations. For example, reference material could include the customer's style guide, a PDF of the document being translated or instructions for translators. Reference material is available to all users to download.

How do I Know if Reference Material Exists For a Job or Project?

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In the **Inbox View** of your inbox, if this icon appears after a job name, reference material has been uploaded for the job or for the project to which the job belongs.

This icon indicates that refrence material exists for this job of project.

To download the reference material for a job, click the icon next to the job name. Alternatively, select the job, click **Download** \clubsuit , select **Reference Material** from the download options that are displayed and then click the **Download** button.

On the **<Job name>** - **Details** screen, if reference material has been added for the job, a link to each file in the reference material is displayed. Click a link to download the reference file.

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On the **<Project name>** - **Details** screen, if reference material has been added for the project, a link to each file in the reference material is displayed. Click a link to download the reference file.

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Reference Material Screen

The **Reference Material** screen lists all reference material that has been uploaded to SDL TMS. The reference material could have been added in respect of particular jobs or projects or it could be material that is relevant to the organization as a whole.

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To access the **Reference Material** screen, click the **Projects** navigation button, select the organization from the drop-down list at the top of the navigation pane and click **Reference Material** in the **Projects** navigation tree. From the **Reference Material** screen you can:

- Upload new reference files
- Download reference files
- Upload new versions of existing reference files.
- Delete reference files.

If no reference files have been uploaded, the **Reference Material** screen will be empty.



NOTE

This screen also displays **Resources**, but only to users who have the necessary permissions.

How to Upload Reference Material to SDL TMS

You upload reference material to SDL TMS using the **Reference Material** screen. You can also upload reference material on the **Job name/Edit** screen; when you upload reference material here it is automatically associated with the job. See *How to Add (or Upload and Add) Reference Material to a Job on page 7-52*.

To add reference file:

- 1 To add a reference file to an organization, click the **Projects** navigation button, select the organization from the drop-down list at the top of the navigation pane and click on **Reference** Material to display the **Reference Material** screen.
- 2 Click the Add Resource button. The Resources/Add screen is displayed.
- **3** You must fill in the following fields:
 - □ Under **Name**, enter a name for your reference file. We recommend that you enter a name that is easily recognizable and meaningful to users.
 - □ Next to **Filename**, either perform a drag-and-drop operation or click inside the area to navigate to the file, select it and click **Open** to upload the file.
 - Under Group, select Reference Material.
 - □ Under **Type**, choose a file type for this reference file.
- 4 You can also complete the following optional fields:
 - □ Under **Description**, enter a description of the reference file. A description might include how and when this file should be used.
 - □ Select **Private**, if you want the reference file to be used exclusively by this organization and not to be available for use by any child organization.
- 5 Click the **Submit** button.

The reference file now appears in the Reference Materials screen and is available for use.

How to Add (or Upload and Add) Reference Material to a Job

When you are creating a new job, you can select reference files on the **Files** tab of the **Create Job** screen; these files are uploaded to SDL TMS when the job is created and they are automatically added to the job. At other times, you add reference material to a job using the **<Job name> / Edit** screen.

On the **<Job name> / Edit** screen you can select existing reference material and add it to the job and you can also upload reference material which is automatically added to the job.

To add reference material to a job using the **<Job name> / Edit** screen:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Expand the tree node of the organization to which the job belongs.
- 4 Select the **Jobs** option. The **Jobs** screen is displayed.
- 5 Click the job name link to display the job on the <**Job name**> **Details** screen.
- 6 Click the Edit button. The <Job name>/Edit screen is displayed. The available reference material is listed in the left-hand box under Reference Material.
- 7 Select the required reference files in the left hand box under **Reference Material** and click the right arrow.
 - If the file you want to add is not in the list you can upload it. To upload a reference file, either perform a drag-and-drop operation or click inside the File name area, locate the file to be uploaded and click Open. Click Submit to upload the file to SDL TMS. You can track the progress of the upload at the

top of the screen. When the file has been uploaded it is automatically added to the job.

NOTE

If you upload a zip file, it will remain zipped when it has been uploaded.

8 Click Submit. When you click Submit, all reference files in the right-hand box are added to the job.



NOTE

Any reference material uploaded on the **<Job name>/Edit** screen is also added to the **Reference Material** screen where it can be seen and selected by other users.

How to Remove Reference Material from a Job

- Follow steps I 6 of the procedure How to Add (or Upload and Add) Reference Material to a Job to display the job on the <Job name>/Edit screen.
- 2 In the right-hand box of the **Reference Material** field, select the unwanted reference material and click the left arrow to move it to the left-hand box.

3 Click **Submit t**o save the change.

How to Edit Reference Material

You may want to change the name of a reference file or change the MIME type, for example.

To edit a reference file:

- 1 Click the **Projects** navigation button.
- **2** At the top of the navigation pane in the **Projects** view, select the organization whose reference files you want to work with.
- 3 In the **Projects** navigation tree, click **Reference Material**. The **Reference Material** screen is displayed.
- 4 Click the name of the reference file you want to edit. The selected reference file's details are displayed on the Resources/Edit screen.
- 5 You can now edit details such as the Name or MIME Type of your reference file, or make it private. You can also download the file to edit it locally, upload the same file or upload a different file.

How to Download a Reference File for Editing

- **1** Follow steps 1-5 in the How to Edit Reference Material procedure above to display the reference file on the **Resources/Edit** screen.
- 2 Click the **Download** button [♥]. SDL TMS places the reference file in a zip file for downloading. When the zip file is ready, an information message is displayed. It contains a link to the zip file.
- **3** Click the zip file link to download the file to your local computer, where you can then open and edit it.



NOTE

When you download a reference file you are downloading a copy of the file. The original file remains in SDL TMS where it can be seen and selected by users.

How to Upload a Reference File Edited Offline

This procedure describes how to upload a new version of reference file that was downloaded for editing. When you upload the new reference file version, it will overwrite the existing reference file in SDL TMS.

To upload a reference file that was previously downloaded:

- **1** Follow steps 1-5 in the How to Edit Reference Material procedure above to display the reference file on the **Resources/Edit** screen.
- 2 Click **Upload**. The **Filename** area is cleared and highlighted for editing.
- **3** Either perform a drag-and-drop operation or click the **Filename** area, navigate to the file to be uploaded, select it and click **Open**.
- **4** To preview the file you have uploaded, click the **Preview** button **S** . You can open the file to preview it or save it to your local computer.
- 5 Make any other required change(s).
- 6 Click Submit.

7

How to Delete Reference Material

You may want to delete reference material that is no longer in use in your organization.

To delete reference material:

- **1** Follow steps 1-5 in the How to Delete Reference Material procedure above to display the reference file on the **Resources/Edit** screen.
- 2 Click the **Delete** button.
- **3** An information message is displayed, prompting you to confirm that you want to delete this reference material. Click **Yes**.

The resource or reference material no longer appears in the **Reference Material** screen and is no longer available for use in your organization.

WORKING WITH PROJECTS

This chapter provides an overview of working with projects in SDL TMS. Sections include:

- About Projects
- Project Management Tools
- Creating Projects
- Maintaining Projects
- Deleting Projects

Chapter



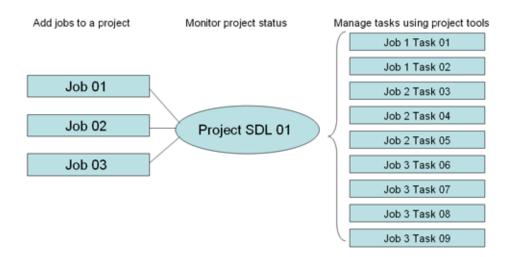
8

ABOUT PROJECTS

Projects provide you with a different way of managing jobs. When you work with projects, you work at task level rather than job level. Jobs are added to a project but when you look at the contents of a project you only see the tasks contained in the jobs, not the jobs themselves. All of the tasks appear together on project screens and the project manager uses special project management tools to work with them. Project tools enable you to:

- Monitor the progress of tasks.
- Specify a due date and time for completing each task step (schedule tasks).
- □ Specify which user will perform each task step.

You can schedule groups of tasks at the same time and you can also assign users to groups of tasks at the same time.



A project in SDL TMS may contain a single job, or a group of jobs that need to be managed together because they are all part of the same piece of work. Here are some key points to remember about jobs and projects:

□ Jobs and projects exist independently of each other; you can add jobs to a project or remove them from a project without affecting the project itself.

Jobs in projects can be managed from the:

Project Daily Summary option on the navigation tree which is accessed by clicking the **Home** navigation button.

Projects Overview and Project options on the navigation tree which are accessed by clicking the Projects navigation button.

Jobs in projects still appear under the **Jobs** option on the navigation tree which is accessed by clicking the **Projects** navigation button. They can be selected from here, viewed and edited.

Access to project functionality is controlled by permissions. If you do not have the necessary permissions, project options will not appear in your navigation tree.

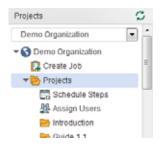
PROJECT MANAGEMENT TOOLS

Accessing Project Management Tools

You can access projects and project management tools by clicking the **Projects** navigation button and selecting the **Projects Overview** option from the navigation tree. When you select this option, the **Projects Overview** screen is displayed. This lists all projects for all organizations and from here you can select a project to work on.

Alternatively, if you want to see the projects for a single organization:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list at the top of the navigation tree.
- 3 Click the plus icon [▶] that precedes the organization to which the project belongs.
- 4 Select the **Projects** option:



When you select the **Projects** option, the **Projects screen** is displayed. It lists all projects for the selected organization. From here you can select a project to work on.

Overview of the Project Management Tools

To help you manage projects SDL TMS provides the following tools:

- The **Project To Do List** lists projects and jobs requiring your attention. Click a link to go to the screen where the action is performed.
- □ The **Project Daily Summary** lists projects which are due to be completed over the next five days and for which you are the project manager. Click a link to go to the screen where you can schedule project steps and assign users to tasks.
- □ The **Project Overview** screen lists all projects for all organizations. Click a project name link to go to the **<Project name> Details** screen.
- □ The **Projects** screen lists all projects for a single organization. Click a project name link to go to the **<Project name> Details** screen.
- □ The **<Project name> Details** screen contains details of a single project and is where you perform project maintenance.

Project To Do List

The **Project To Do List** screen lists projects and jobs requiring your attention. Click a link here to go to the screen where you can take the required action. The screen contains:

- Projects for which you are the project manager, and
- Jobs created using a Configuration on which you are named as the default project manager.

Project To Do List screen example:

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Create Job	Tasks You Currently Own	- Inbox				
Project To Do List	Organization	Project	Job	Task Count	Word C	ount
Project Daily Summary	_Tech Handover Org		My first job		2	176
The second secon	My Organization	-	_LCMT - Baseline No Termbase		1	37
A My Details	My Organization		_LCMT - Travel and Termbase		1	37
Max - y o t tank	Customer 1	-	Test Job		1	44,115
	Customer 1	-	Test Job 2		1	40,375
	_Tech Handover Org		My second job		1	24
	Customer 2	-	TMS-10063 Test 2		1	10
	Customer 2	-	5 dol		1	17
	Customer 2	-	TMS-10053 Test 4		1	18
	Customer 2		Job 5		1	17
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	Overdue Steps					
Home	There are no records to di	splay.				
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Projects	There are no records to di	There are no records to display.				
Reports	III Unallocated Steps					
🗘 Setup	There are no records to di	splay.				
O Search	Completed Translatio	n (Ready For Ret	rieval)			
-	There are no records to di	splay.				

The **Project To Do List** is displayed when you click the **Home** navigation button and select the **Project To Do List** option from the navigation tree. The screen is split into five parts:

Tasks You Currently Own - Inbox	Lists the contents of your SDL TMS inbox. Click a link here to display your SDL TMS inbox.
Overdue Steps	Displays tasks in projects that have missed their scheduled deadline for completing a workflow step. Click a link here to go to the Schedule Steps screen.
Unscheduled Steps	Displays tasks in projects that have not yet been given a deadline for completing workflow steps. Click a link here to go to the Schedule Steps screen.
Unallocated Steps	Displays tasks in projects that contain workflow steps which have not been assigned to users. Click a link here to go to the Assign Users screen.
Completed translations	Displays completed translations ready for downloading. Click a link here to go to the < Project name>/Edit screen or the < Job name>/Edit screen where the Download Files button is located.

Project Daily Summary

You need View Daily Summary permissions to see the daily summary.

The **Project Daily Summary** screen lists projects which are due to be completed over the next five days and for which you are the project manager. Overdue tasks and tasks which have not yet been scheduled or assigned to users appear in the **Today** table, they are displayed in red.

The **Project Daily Summary** screen is displayed when you click the **Home** navigation button and select the **Project Daily Summary** option from the navigation tree. The **Project Daily Summary** screen is split into five tables, one for each of the five days. Each table contains a list of projects that have steps due on that day.

- □ Tasks which have not yet been assigned to a user or group are marked **Not allocated** in the **Users Assigned** column. Click the **Not allocated** link to go directly to the **Assign Users** screen.
- Project steps which have not yet been scheduled are marked Not scheduled in the Due Date column. Click the Not scheduled link to go directly to the Schedule Steps screen.

Field	Description
Organization	Organization that owns the project.
Project	Project name. Click the project name link to go to the < Project name> - Details screen.
Job	Job containing tasks due on this date. Click the job name link to go to the < Job name> - Details screen.
Language pair	Source and target languages of the tasks on this row of the table.
Workflow Step	In this project, tasks for this language pair should have completed this workflow step by the date in the Due Date column. Click a workflow step name link to go to the Schedule Steps screen.
Item Count	Number of source language files for translation in the tasks on this row of the table.
Word Count	Number of words in these tasks.
New	Number of new words in the word count. New words are words not found in the translation memory.
Due Date	Date by which tasks for this language pair should have completed this workflow step. If steps have not been scheduled, click the Not scheduled link to go to the Schedule Steps screen.
Users Assigned	Users assigned to the tasks at this workflow step for the language pair. If users have not been allocated to the step, click the Not allocated link to go directly to the Assign Users screen.

You can set the **Project Daily Summary** screen to be your default **Home** page. Go to your **Inbox** and click the **My Details** button. The **Users/Edit** screen is displayed. The **Home** Page setting is on the **User Preferences** tab.

Projects Screen and Projects Overview Screen

The **Projects Overview** screen and the **Projects** screen have the same layout but they provide different functionality:

- The **Projects Overview** screen lists all projects for all organizations.
- The **Projects** screen lists all projects for a single organization.
- □ You cannot create new projects from the **Projects Overview** screen but you can from the **Projects** screen.
- □ You cannot delete projects from the **Project Overview** screen but you can from the **Projects** screen.

Field descriptions for the Projects screen and the Projects Overview screen:

Field	Description	
Select 🗹	Select the project and click Delete to remove it from SDL TMS. This button does not appear on the Projects Overview screen.	
Organization	Name of the organization for which the project was created.	
Project Code	Project identifier. If the project was created via the Create Job screen, this defaults to PRJ_PORTAL.	
Name	Project name. Click a link in this column to display the selected project on the <project name=""> - Details</project> screen where you can edit project details, schedule project steps, assign users to project steps, download files or perform job or task maintenance.	
Project Manager	Project Manager. If you are one of a group of project managers, select your name from the drop-down list in this box to filter everyone else's projects from the screen.	
Word Count	Number of words in all tasks in all jobs in the project.	
Item Count	Number of items in all tasks in all jobs in the project.	
Creation Date	Date the project was created.	
Language Pairs	Language pairs in this project.	

Status	Summarized status information for all tasks in the project. For example, 75% Translation , 25% Review .
Description	Project description. This may be added when the project is created or it can be added or updated later.
Private	A check mark 🗹 here indicates that the project is private. Private projects cannot be seen by sub-organizations.
Add Project 👎	Click this to display the Projects/ Add screen where you can create a new project. This button does not appear on the Projects Overview screen.
Delete	Click this to delete a project from SDL TMS. This button does not appear on the Projects Overview screen.

<Project name> - Details Screen

This is described in detail later in this chapter. See *<Project name> - Details Screen* on page 8-14.

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CREATING PROJECTS

There are two ways to create a project:

- □ When you are creating a new job on the **Create Job** screen, you can create a new project at the same time. The job name becomes the project name.
- Click the Add Project button on the Projects screen to display the Projects/Add screen. Complete this screen to create the project.

In the first method, the project is created when the new job is created and the new job is automatically added to the project. In the second method, the project is created and then jobs are selected and added to the project later.

Creating a Project when Creating a Job

If the job you are adding is the first job of several that belong to a project (or is the only job in the project), then you can create the project and the job at the same time. Simply select the **Create new project** option from the drop-down list in the **Project** box. When you click the **Upload Documents** button to create the new job, the new project is also created. By default, the project is given the same name as the job (but you can edit this later if you want).

The next time you add a job, if you use the same Configuration, the new project will appear in the list of projects available for selection in the **Project** box. If you want to add the new job to the project, select the project from the list.

Creating a Project from the Projects/Add Screen

The **Projects/Add** screen is displayed when you click the **Add Project** button on the **Projects** screen. When you create a project here, you can select existing jobs and add them to the project. Once the project has been created, you can add further jobs to the project as you create them on the **Create Job** screen, or you can add them via the **<Project name>/Edit** screen. Projects/Add screen example:

📴 My Organization 🕨 P	rojects + Add	0	01
Back Refresh	Submit		-
Page	Action		
Name	My project		0
Description	<u></u>		0
Private			0
Project Code	ACDC		0
Project manager	None		0
Client Contact	None		0
Default Configuration	_LCMT - Baseline No TB		0
Jobs	Available Jobs (5)	Selected Jobs (0)	. 0
	My Organization (5) • _LCMT - Baseline No Termbase • _LCMT - Travel and Termbase • job 1 • PDF source file • Vendor with custom step	\$	
Reference Material	Available Reference Material (2)	Selected Reference Material (0)	0
	Root Organization (1) Demo Ref Mat My Organization (1) • SDL TMS update - 201601 January.pdf	*	

Field descriptions for the **Projects/Add** screen:

Field

Description

Creating Projects

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Name	Project name.
Description	You can add a project description here if you want.
Private	Select this to make the project private. When a project is private, it cannot be seen by sub-organizations. If you add a private job to the project, then you must also make the project private.
Project Code	You can specify a code that uniquely identifies the project.
Project Manager	If you want, you can click the down arrow and select a user to be the project manager for the project.
Client Contact	If you want, you can click the down arrow and select a user to be the client contact for the project.
Default Configuration	Select the configuration to be used when creating jobs to be added to this project. On the Create Job screen, if a user wishes to add a job to an existing project, the only projects available for selection will be projects that use the same configuration that the user has selected in the Choose a configuration box.
Jobs	Existing jobs which are not already part of a project are listed here. You can select jobs and add them to the new project. To add jobs, select the job(s) and click the right arrow. If you select a job that is private, the project must also be made private. A private job is preceded by a large black dot.
Reference Material	All available reference material is listed here. If you want to link some reference material to the project, select the material and click the right arrow.

To create a new project from the Projects/Add screen:

- 1 Click the Projects navigation button. The Projects navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon ^I that precedes the organization to which the project belongs.
- 4 Select the **Projects** option. The **Projects** screen is displayed.
- 5 Click the Add Project button. The Projects/Add screen is displayed.
- **6** Complete the screen with the new projects details. Refer to the field descriptions table above for an explanation of the fields on this screen.

- 7 Click the **Submit** button when you have finished. The **<Project name>/Edit** screen is displayed.
- 8 If you want, you can make changes to the new project settings and Submit them. If you do not want to make any changes to the project, select a navigation tree option to exit the screen.

MAINTAINING PROJECTS

Project maintenance is performed on the <Project name> - Details screen.

<Project name> - Details Screen

From the <Project name> - Details screen you can:

- Edit general project details, including the project manager.
- Add jobs and reference material to the project.
- □ Schedule project steps.
- Assign users to project steps.
- Download project files.
- Delete the project.



NOTE

The **<Project name>** - **Details** screen has the same layout and content as the **<Job name>** - **Details** screen. The difference is that the **<Project name>** - **Details** screen contains summary information for all tasks in all jobs in the project.

Project Summary Pane

The details in this part of the screen may be edited on the <**Project name**>/**Edit** screen.

Field	Description
Name	Project name. This can be changed at any time.
Description	Project description. If the project was created via the Create Job screen there will be no description. You can add or update the description at any time.
Project Code	Project identifier. PRJ_Portal indicates that the projects was created via the Create Job screen. You can add or update the code at any time.
Creation Date	Date the project was created. This cannot be changed.

Due Date	Date by which all work on the project should be completed. This box will only contain a date if all of the project steps have been scheduled.
Project manager	Project manager. Click the name to email the person named here. If there is no project manager or if you want to change the current project manager, you can do this by editing the project details.
Client contact	Named contact for the client. Click the name to email the person named here.
Reference Material	Reference material that has been linked to this project. Reference material is selected on the < Project name>/Edit screen.

Configuration Details Pane

Field	Description
Name	Configuration name. This is the default configuration for this project. All jobs added to this project should be created using this configuration.
Description	Description of the configuration.
TM Sequence	Translation memory sequence applied to the tasks created using this configuration.
File Types	The file types handled by this configuration.
Workflows	The workflows available on this configuration.
Language Pairs	The language pairs handled by this configuration.
Cost Models	The cost models available to be applied to tasks created using this configuration.

Jobs Summary Pane

Each row of this table represents one job in the project.

Field	Description
Name	Job name.
Word Count	Number of words in all tasks in the job.
Item Count	Number of source language files submitted for translation.
Creation Date	Job creation date.
Configuration	Configuration used to create the job.
Status	Summary view of the current status of tasks in the job.
Cost	Cost of completing all of the translation tasks in the job.

User	User assigned to the step in the Status column.
Active	Yes = The job is active. No = The job has been deactivated or deleted.
Language Pairs	Language pairs in the job.
External Job ID	Internal ID automatically assigned to the job when it was created.
Description	Job description.
Organization	Organization for which the job was created.
Private	A check mark here indicates that this job is private and cannot be seen by sub-organizations
Due Date	Date by which all work on the job should be completed.

Step Status Pane

The information here is a summary of data for all tasks in all jobs in the project.

Field	Description
Users Assigned	User or group assigned to this workflow step for this language pair. Click a link here to display the Workload screen for this user.
Language Pair	Analysis of progress is shown by language pair. Click a link in this column to display the Task Status Summary screen. This screen shows the individual tasks for this language pair and shows the current workflow step for each one.
Workflow Step	Workflow step name. Click a link in this column to display all tasks at the same step (for the same language pair) on the Task Status Summary screen.
Status	Displays the current status of the tasks at this workflow step for this language pair: In Progress (#% Complete) – The tasks are currently being worked on. The percentage figure tells you how much of the work has been done. Pending – These tasks cannot be started until an earlier workflow step has been completed. Complete – These tasks have been completed.

Tasks In Progress	The number of tasks at this step for the language pair.
Words In Progress	The number of words in tasks at this step for the language pair.
System	By default, only human workflow steps appear in this table. You can also display automated steps performed by the system. Select an option from the drop-down menu:
	All - Display human and system steps.
	Yes - Display system steps only.
	No - Display human steps only.
Due Date	Date by which this step should be completed. A date will only appear here if the steps have been scheduled.
Task Count	Number of tasks that will go through this step for the language pair.
Word Count	Number of words in tasks for this language pair.

Linguistic Analysis Pane

The information here is a summary of data for all tasks in all jobs in the project.

Field	Description
Language Pair	The figures on this row are for this language pair. Click a link in this column to display the Cost Banding screen. This screen shows a detailed breakdown of translation statistics and also shows how translation costs have been calculated. For more information about the Cost Banding screen, see <i><job< i=""> <i>name>/Cost Banding Screen</i> on page 7-14.</job<></i>
PerfectMatch	The number of words translated by the system using PerfectMatch. PerfectMatch translations are taken from earlier, translated versions of the same file or related files and are always exact matches (like a 100% translation memory match).
Hundred	Number of words translated by the system during pre-processing with a 100% translation memory match.
Fuzzy	Number of words translated by the system during pre-processing with a less than 100% translation memory match.

New	The number of new words found during pre-processing. New words are words that do not currently exist in the translation memory.
Repetitions	The number of words in repeated segments. The words in the first instance of a segment are added to the other totals. The words in repetitions of a segment are added to this total.
Word Count	Total number of words in tasks for this language pair.
Confirmed	Number of words in confirmed segments. A confirmed segment is one which has been translated and is complete.
Unconfirmed	The number of words in segments which have not yet been confirmed.
Buttons	

Field	Description
Edit Project Details	Click this to display the < Project name > /Edit screen. This is where you can update general job details, link reference material to the job, deactivate or delete the job. If you use dynamic cost variables in your cost formulas, this is where you can update the value of a variable.
Download Files	Click this to display the Download Files screen where you can download source files, ITD and SDLXLIFF files, completed translations, translation memories and reference material.
Schedule Steps	Click this to display the Schedule Steps screen where you can assign a completion date and time for each step in the job.
Assign Steps	Click this to display the Assign Users screen where you can use various methods to assign users to project tasks.

Adding Jobs to an Existing Project

There are two ways to add jobs to a project:

- □ On the **Create Job** screen, when you create a new job you can add it to a project.
- □ On the **<Project name>/Edit** screen, you can select existing jobs and add them to the project.

Adding Jobs to a Project from the Create Job Screen

One of the boxes available for completion on the **Create Job** screen is **Project**. Click the down-arrow in this box to display a list of available projects for the configuration you have selected. Select a project and when you create the job it is automatically added to the selected project.

Add Jobs to a Project from the <Project name>/Edit Screen

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon **b** that precedes the organization to which the project belongs.
- 4 Select the **Projects** option. The **Projects** screen is displayed.
- 5 Locate the project to be updated.
- 6 Click the project name link in the Name column. The <Project name> Details screen is displayed.
- 7 Click the Edit Project Details button. The <Project name>/Edit screen is displayed.
- 8 Select the job(s) to be added to the project from the list in the Jobs box.
- 9 Click the right arrow to add the jobs to the project.
- 10 Click Submit when you have finished adding jobs.

Adding Reference Material to a Project

Follow steps I - 7 of the Adding Jobs to an Existing Project to display the **<Project name>/Edit** screen. In the Reference Material box, select the required reference material from the box on the left and click the right arrow. The selected reference file is added to the box on the right. The files in the box on the right will appear as reference material for this project.

Click Submit to save the change when you have finished.

Scheduling Project Steps

You can assign a 'completion required by' date and time to each workflow step for each language pair. In SDL TMS, this is referred to as scheduling steps. You can download step due dates and times to your Microsoft Outlook calendar and Outlook will generate reminders for you. When users receive a task that has been scheduled, they can see the task due date and time in their SDL TMS inbox. Steps are scheduled on the **<Project name>/Schedule Steps** screen.

This screen lists all workflow steps to be completed for all tasks in the project and you can assign a due date and time to each one. You can also specify a reminder time. For example, if you select a reminder time of 12 hours, SDL TMS will send a reminder email to the user assigned to the step when the step is within 12 hours of its due date/time for completion and it is not finished.

The **<Project name>/Schedule Steps** screen is displayed when you click the **Schedule Steps** button on the **<Project name> - Details** screen or a link on either the **Project To Do List** screen or the **Project Daily Summary** screen.

Field	Description
Name	Project name.
Project Code	Project identifier.
Language Pair	One of the language pairs in the project.
Workflow Step	Workflow step name. Click a link in this column to display all tasks at the same step (for the same language pair) on the Task Status Summary screen. Select a step from the drop-down list available here to exclude all other steps from the screen.
Reminder	Specify how soon before the step due date/time a reminder should be sent to the user assigned to the step. The reminder is sent to the user's SDL TMS inbox. On the last row of this table, you can specify a reminder time for all currently displayed steps.
Word Count	Number of words in the tasks at this step for this language pair.
Due Date	The date/time by which the workflow step should be completed. Click the calendar icon to select a due date and time. On the last row of this table, you can specify a due date for all currently displayed steps.
	icalendar - Click the icon that appears in this column to download the step due date/time details and add them to your Microsoft Outlook calendar. Outlook will issue a reminder at the specified time.

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Status	Tells you how much work has been done on the tasks at this workflow- step. This figure is expressed as a percentage, for example, 50% would indicate that the tasks are 50% complete.
Step Order	Order in which this step appears in the workflow. You can sort the entries on this screen so that they all appear in workflow order. For example, this step is the sixth of ten steps in the workflow: 6/10. The ten steps include system steps. If there are jobs in the project that use different workflows, this option will not work.
Organization	The organization to which the project belongs.
Project Manager	The project manager for this project.
Users Assigned	Users assigned to the steps.
Task Count	Number of tasks at this step for this language pair.

Scheduling Steps

- 1 Display the project on the **Schedule Steps** screen.
- 2 Click the Step Order column header to put the steps in workflow step order.
- **3** Locate the first unscheduled step(s).
- 4 Filter the screen to exclude all other types of workflow step.
- 5 Click the calendar icon on the bottom row of the table.
- **6** Select the step due date and time.
- 7 Click this 🗹 to save the date/time and close the calendar.
- 8 If you want, select a reminder deadline from the drop-down list in the **Reminder** box on the bottom row of the table.
- 9 Click **Submit** to save the updates.
- **10** Select **All** in the drop-down box at the head of the **Workflow Step** column. All steps are redisplayed and the newly scheduled steps should no longer be red.
- 11 Repeat steps 3 9 for each set of unscheduled steps.

Downloading a Step Reminder to Microsoft Outlook

1 Click the **icalendar** icon 🛱 for the step. The **File Download** dialog box is displayed.



- 2 Click the Save button. The Save As dialog box is displayed.
- 3 Select the folder where you want the downloaded calendar file to be placed and click Save. The file is downloaded.
- 4 Locate the downloaded calendar file on your PC.
- 5 Double-click the file. A Microsoft Outlook appointment is created.
- **6** Click the appointment **Save and Close** button. The appointment is added to your Outlook calendar.

Default Project Schedules

You can create a default project schedule that is automatically applied to all new jobs that are part of a project. A default schedule sets a time limit for performing each workflow step and a reminder time limit for each step. For example, the schedule could say that the translation step should take no more than three days to complete and a reminder should be issued to the translator 12 hours before the three day deadline is reached.

In order to use a default project schedule to jobs, you must add it to a Configuration. All new jobs created using the Configuration, if they are also added to a project at the same time, are automatically scheduled using the default schedule. The job Due Date is used to determine when each step should be completed by. Once the job has been created, you can change the step due dates generated by the default schedule if you want.

You can have more than one default project schedule, but only one schedule can be assigned to a Configuration. This means that all project jobs created using a Configuration containing a default project schedule will have the same schedule applied to their steps.

Project schedules are created on the **Project Schedules/Add** screen. This screen is displayed when you select click the **Setup** navigation button, select the organization from the drop-down list, select the **Project Schedules** option from the navigation tree and click **Add Project Schedule**.

Project Schedules/Add screen example:

Bemo Organization	Setup > Project Schedules > Add	11
Back Refresh Info	Submit	^
		-
Name	My Project	0
Description	$\hat{}$	0
Private		0
Workflow Steps	Available Workflow Steps (25) Selected Workflow Steps (3)	0
	Root Organization (25) Root Organization (3) Client Approval for DTP Approval Client Review Authorization Client Review Translation Convert Task Convert To Flat Text	
Language Pairs	Available Language Pairs (7) Selected Language Pairs (1)	0
	Demo Organization (5) Performance EN-US > ES Performance EN-US > ES Performance EN-US > IT Performance RO > EN-GB Performance RO > FR Performance Root Organization (2) Performance EN-US > FR-R Performance	
Duration & Reminders	Approval Days	0
	Authorization 1 60 Minutes Days	
	Translation Translation Days	

Field

Description

Name

8

Description	Description of the schedule usage.
Private	Select this to make the schedule private to this organization.
Workflow Steps	Select the workflow steps to be scheduled. You might want to check the workflows available on the Configuration to which the schedule will be added. You can schedule all of the available workflow steps or just some of them. Once a job has been created, you can schedule any unscheduled steps later manually via the Projects/Schedule Steps screen. Selected steps appear in the Duration & Reminders part of the screen.
Language Pairs	Select the language pairs to be affected by this schedule. Only tasks created for these language pairs will be scheduled.
Duration & Reminders	This is where you specify how long each step should take and when reminders should be issued. For each step, check the default step length/reminder value and change them as required. Overtype the duration figure and select a day/hours option from the drop-down list. You can set different durations and reminders at language pair level. Click the plus sign that precedes the step name to display the language options.

Creating a Default Project schedule

- 1 Click the Setup navigation button. The Setup navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon ^b that precedes the organization to which the project belongs.
- 4 Select the **Project Schedules** option. The **Project Schedules** screen is displayed.
- 5 Click the Add Project Schedule button. The Project Schedules/Add screen is displayed.
- **6** Create the schedule. Refer to the Field Description table on page 8-25 for help when completing each field on the screen.
- 7 Click the Submit button when you have finished. The Project Schedule/Edit screen is displayed.
- 8 If you want, you can make changes to the new project schedule and **Submit** them. If you do not want to make any changes to the schedule, select a navigation tree option to exit the screen.

For the default project schedule to be used, you now need to add it to a Configuration.

Adding a Default Project Schedule to a Configuration

- 1 Click the Setup navigation button. The Setup navigation tree is displayed.
- 2 Check the currently selected organization for which the project schedule is being added and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon ^b that precedes the organization to which the project belongs.
- 4 Select the **Configurations** option. The **Configurations** screen is displayed.
- 5 Select the Configuration to which you want to add the project schedule. To select a Configuration, click a link in the Name column. The <Configuration name>/Edit screen is displayed.
- 6 If an information message is displayed, click the **Info** button to clear it from the screen.
- 7 Display the **Optional Elements** tab (click the **Optional Elements** name at the bottom of the screen).
- 8 Complete the **Project Schedule** field by selecting the default project schedule.
- 9 Click **Submit** to save the change.

The schedule will be applied to all new project jobs created using the Configuration.

Assigning Users to Project Steps

There are three ways to assign users or groups to project tasks: Auto Assign, Assign Task, Assign Users and Advanced Assign Users.

Auto Assign	In this option, SDL TMS automatically distributes tasks among the members of a group. As far as possible, SDL TMS ensures that the workload is distributed evenly. To use this option, you must select a workflow step and language pair combination (Translation EN_US > DE, for example) plus a user group. SDL TMS then:
	Establishes which tasks are at the selected workflow step for the selected language pair.
	Distributes the tasks evenly among the members of the group.
	Once the tasks have been distributed, you can change individual assignments via the Assign Users screen if you want. For this functionality to work, the language pair/workflow step combination you select must contain more than one task and the group must contain more than one member.
	Auto Assign is performed on the Auto Assign - <project name=""></project> screen.
Assign Tasks	From here you can see the individual tasks and assign then one by one to a specific user or user group. Tasks that have already been assigned may be reassigned to a different user/group here.
	Assign Tasks is performed on the Task Assign screen.
Assign Users	This option enables you to assign a user or group to a workflow step/language pair. This means that the user or group is responsible for performing all of the tasks at the step for the selected language pair.
	Assign Tasks is performed on the Assign Tasks screen.
Advanced Assign Users	This option enables you to filter the list of users available to be assigned to tasks. You can filter users by language, rating and specialist subject. These values are created and maintained on the Additional Information tab of the Users/Add or Users/Edit screen.

You assign users to project tasks via the **Assign Users** screen. You can assign users to workflow steps that are currently not allocated, or you can use the screen to reassign tasks from one user or group to another.

The **Assign Users** screen is displayed when:

- You click the **Assign Steps** button on the **<Project name> Details** screen.
- You click the **Projects** navigation button, select the organization from the drop-down list in the

navigation tree, click the plus icon \mathbb{P} that precedes the **Projects** option and select the **Assign Users** option.

You click a link in the **Unallocated Steps** table of the **Project To Do List** screen.

When you select the **Assign Users** option from the navigation tree, the screen contains all tasks for all projects. The other methods display a project specific list of tasks.

Auto Assigning Users

- 1 Display the **Assign Users** screen. If you want to work with a specific project, make sure that other projects are filtered out of the display.
- 2 Select the language pair/workflow steps for which you want to assign tasks.
- 3 Click the Auto Assign button. The Auto Assign screen is displayed.
- 4 Click the down arrow in the **Auto Assign** box (on the last row of the table) and select the required group. Additional fields are displayed. They show the translators to whom the tasks have been assigned and the percentage split of work between the group members.
- 5 If you want, adjust the figures that appear in the % Words to Assign column.
- 6 Click the **Submit**. The tasks are assigned.

Assigning Tasks

- 1 Display the **Assign Users** screen. If you want to work with a specific project, make sure that other projects are filtered out of the display.
- 2 Select the language pair/workflow step combination(s) containing tasks to be assigned.
- 3 Click the Assign Tasks button. The Assign Tasks screen is displayed.
- 4 Locate the first task to be assigned.
- 5 Select the user or group that you want to perform the task from the drop-down list in the Assign User/Group box.
- **6** Locate the next task to be assigned and select the required user or group.
- 7 Continue until all tasks have the correct user or group assigned.
- 8 Click the **Submit** button to assign the tasks.

Assigning Users

- 1 Display the **Assign Users** screen. If you want to work with a specific project, make sure that other projects are filtered out of the display.
- 2 Select the language pair/workflow step combination(s) containing tasks to be assigned.
- 3 Click the Assign Users button. The Assign Users screen is displayed.
- 4 Locate the first workflow step/language pair containing tasks to be assigned.
- 5 Select the user or group that you want to perform the tasks from the drop-down list in the Users Assigned box.
- 6 Click the **Submit** button to assign the tasks.

Using Advanced Assign Users

- 1 Display the **Assign Users** screen. If you want to work with a specific project, make sure that other projects are filtered out of the display.
- 2 Select the language pair/workflow step combination(s) containing tasks to be assigned.
- **3** Click the **Advanced Assign Users** button. The **Advanced Assign Users** screen is displayed.
- 4 Under **Filter Users**, select the attributes the ideal user should have. Matching users are displayed in the **Available User** part of the screen when you select the different attributes.
- 5 Under **Step Summary**, select the step(s) to be assigned. You do this by selecting the box in the **Users Assigned** column.
- **6** Under **Available User**, select the user to be assigned to the step(s). You do this by selecting a box in the **Assign User** column.
- 7 Click the **Assign User** button. The selected user is assigned to the selected step(s) and their user name is displayed in the **Users Assigned** column.
- 8 Click **Submit** when you have finished.

Downloading Project Files

You download project files from the **Download Files** screen. The following project files may be downloaded:

- □ ITD or SDLXLIFF files
- Translation Memories
- Source files
- Completed translations
- Reference material.

To download files:

- 1 Click the **Download** button on the **<Project name> Details** screen. The **Download Files** screen is displayed.
- 2 Select the file(s) to be downloaded (tick the **Select** box for each language pair).
- 3 Click the **Download** button. The selected files are compressed into a single . zip file for downloading. An information message is displayed when the . zip file is ready.



NOTE

If the zip process is taking a long time, you can exit this screen and download the file later from the **My Downloads** screen. To display the **My Downloads** screen, select the **My Downloads** option from the navigation tree.

- 4 Click the . zip file name link in the information message to download the file:
 - If you are using Microsoft Internet Explorer, the File Download dialog box is displayed. Click Save, the Save As dialog box is displayed. Navigate to the folder where you want the . zip file to be placed and click Save. The download now takes place.
 - □ If you are using Mozilla Firefox, the **Opening filename.zip** dialog box is displayed. Select **Save to Disk** and click **OK**. The .zip file is downloaded to your default download folder.
- 5 Click the Info button to close the information message containing the download link.

DELETING PROJECTS

When a project is finished, you should delete it, as project data is not archived. Deleting a project does not affect the jobs that were part of the project. When the jobs are completed they, and all data relating to them, will be archived.

To delete a project:

- 1 Click the **Projects** navigation button. The **Projects** navigation tree is displayed.
- **2** Check the currently selected organization and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon **b** that precedes the organization to which the project belongs.
- 4 Select the **Projects** option. The **Projects** screen is displayed.
- **5** Locate the project to be deleted.
- 6 Click the project name link in the **Name** column. The **<Project name> Details** screen is displayed.
- 7 Click the Edit Project Details button. The <**Project name**>/Edit screen is displayed.
- 8 Click the **Delete** button. A confirmation message is displayed.
- 9 Click **Yes**. The project is deleted immediately.



8 Deleting Projects

WORKING WITH USERS & GROUPS

This chapter provides an overview of working with users and groups. Sections include:

- About Users and Groups
- About Vendor Users
- Working with Users
- Working with Groups

Chapter

9

9

ABOUT USERS AND GROUPS

Users are the people who are available to work on SDL TMS tasks. For example, there are users who authorize tasks, users who are project managers and users who translate or perform language reviews. A group is a collection of users; usually users who perform the same sort of role in SDL TMS. For example, you could have a group of English-French translators, a group of French language reviewers and a group of project managers. A user can belong to more than one group; there is no limit to the number of groups to which a user can belong.

SDL TMS permissions are assigned to groups, not users. When a user becomes a member of a group, the group permissions are inherited by the user. Users who belong to more than one group inherit permissions from all of them.

About Vendor Users

Vendor users are created from the same screen as other users in SDL TMS. They are not added to groups. Vendor users acquire permissions by adding the user to a vendor. For more information, see the SDL TMS Administrator Guide.



NOTE

If a user belongs to a vendor, the vendor to which they are belong is displayed on the **Users/Edit** screen on the **Additional Information** tab.

Users, Groups and Workflows

A user or group may be assigned to each 'human' step of a workflow. A human step is one performed by a person rather than the system. For example, authorization and translation are human steps. In order for a user to be sent new tasks automatically by SDL TMS, they must be assigned to a particular workflow step for a language pair. All tasks for the language pair reaching this step are automatically placed in the user's SDL TMS inbox.

When a group is assigned to a workflow step, tasks reaching the step are sent to all members of the group. Group members examine the tasks and then take ownership of tasks. Once a group member has taken ownership of a task, other group members cannot access it.

All users are automatically added to the default **Users** group. This group cannot be assigned to workflow steps or selected to perform SDL TMS tasks.



- If you are using projects, you can have SDL TMS automatically distribute tasks evenly among the members of a group. For more information, see Assigning Users to Project Steps on page 8-29.
- Workflow steps can be left unallocated. This means that no user or group is assigned to the step. You can leave workflow steps unallocated if you prefer to assign tasks to users and groups manually as the tasks arise. In order to manage unallocated tasks effectively, you should be the project manager for jobs containing the tasks.

Vendor Users and Workflows

All 'human' steps in a workflow can be flagged as vendor-enabled apart from the **Authorization** and **Recovery** steps. These steps are flagged as vendor-enabled in the setup of the workflow. This allows you to select the vendor to assign to that workflow step and any other vendor-enabled steps in the workflow during the **Authorization** step. When the vendor is selected for use, the vendor project manager is automatically assigned to the **PJM Authorization** step and the vendor users that are set up for that language pair are automatically assigned to the relevant vendor-enabled steps in the workflow.

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Accessing Users and Groups

Access to users and groups is controlled by permissions. Permissions are assigned to groups, not individual users. If you are a member of a group that has the necessary permissions, you can add new users and groups to your SDL TMS system, edit existing users and groups and delete users and groups.



You cannot add yourself to a group. Only the system administrator can add users to groups.

Users and groups are added and maintained via Users & Groups option on the navigation tree.

Users and Groups Screen

The **Users and Groups** screen gives an overview of current users and groups. To display this screen, click the **Setup** navigation button, select the organization from the drop-down list at the top of the navigation pane and select the **Users & Groups** option from the navigation tree.

Field	Description
Users	Click this link to display the Users screen where all current users are listed.
Groups	Click this link to display the Groups screen where all current groups are listed.
Owned	This is the number of users or groups added for this organization.
Available	This is the number of users or groups available to be used by this organization. This number may include users and groups added for a parent organization.
+	Add User – Click this to display the Users/Add screen where you can add a new user.
÷	Add Group – Click this to display the Groups/Add screen where you can add a new group.

WORKING WITH USERS

All current users are listed on the **Users & Groups/Users** screen. From here you select a user and edit their details, add a new user or delete a user. This screen is displayed by clicking the **Users** link on the **Users & Groups** screen.

Field	Description
Organization	Organization for which the user was added.
Name	The user's name. Click a link here to display the user's details on the Users/Edit screen for editing or for deleting. This is the name that appears on emails sent to this user by SDL TMS.
Description	User description. This usually describes their role in SDL TMS.
Email address	User's email address. All SDL TMS notifications are sent to this address.
Telephone Number	User's telephone number.
Address	User's address.
Private	If this is selected, the user is private to this organization.
In Use	A check mark here indicates that this user has been added to a group. If the user has been added to a group, they cannot be deleted until they have been removed from the group.
Static	A check mark here indicates that this is a system default user. For example, the System Administrator is a system default user. You cannot edit a system default user.
÷	Add User – Click this to display the Users/Add screen where you can add a new user.
÷	Add DS User – Click this to display the Users/Add screen where you can add a new user using the personal and login details defined for the user's local network access.

Adding a New SDL TMS User

Adding a new user requires you to add their personal details and also to specify their personal preferences for working in SDL TMS. The preferences include such things as what screen is displayed when the user logs on to SDL TMS, whether format painting should appear on the translation screen and whether segments translated with a 100% translation memory match should be locked automatically during pre-processing. Once a user has been added, if you want the user to receive new tasks automatically from SDL TMS, the user must either be assigned directly to a workflow step or added to a group that has been assigned to a workflow step.

New users are added on the **Users/Add** screen. The screen has three parts:

- The **User Details** tab.
- The User Preferences tab.
- The Additional Information tab.

To switch between the three tabs, select the tab name (on the bottom row of the screen).

Adding a Directory Services (DS) User

If your system has been DS enabled, you have the option to add a DS user. This simply means that when you are adding a new SDL TMS user, the **User Details** tab of the **Users/Add** screen is completed for you as the user's details are taken from your local network files. A DS user uses the same login name and password for SDL TMS that they use for accessing their local network.

When adding a DS User, the **User Details** tab screen looks a little different. You select a user from a drop-down list and the password fields do not appear.

Field descriptions User Details tab:

Field	Description
Name	The user's name. If you are adding a DS user, you must select the user from a drop-down list of available users.
Description	User description. This usually describes their role in SDL TMS. This field is played only for a DS user.
Private	Select this to make the user private to this organization.
Username	Name the user will use to log in to SDL TMS. This field is displayed only for a DS user.
Password	Password the user will use to log in to SDL TMS. This field is not displayed for a DS user.
Confirm Password	Repeat the password. This field is not displayed for a DS user.
Email address	User's email address. All SDL TMS notifications are sent to this address. This field is displayed only for a DS user.
Telephone Number	User's telephone number. This field is displayed only for a DS user.
Address	User's address. This field is displayed only for a DS user.
Telephone number	User's telephone number. This field is displayed only for a DS user.
Disable login	Select this to disable the user's login. Clear the selection to make the login active again.

Field descriptions **User Preferences** tab:

Field	Description
Locale	The language in which SDL TMS screens are presented. This also determines the date format used in the interface.
Toolbar display	Select Default to display buttons as large icons with labels or Minimized for buttons with smaller icons only.
Information messages	System messages are automatically displayed in the Info window at the top of the screen. If you de-select this option, the user must click the Info icon to open the window and view the messages.
Display time	Select this to include the time as part of displayed dates.
Decimal places	Select the number of decimal places to which numbers will be expressed.
Personalize tables	Select this to enable the user to personalize the layout of tables. Personalization includes removing and moving columns.
	Specify which screen the user should see when they log on:
	Inbox – the standard inbox view.
	Organization Overview.
	Translation Portal (the Job Creation screen).
Home page	Translation Portal - Full Screen (this type of user cannot see any other SDL TMS screens than the create Job screen).
	Project To Do List.
	Perspective.
	Note : The full list of options displayed depends on user permissions and system settings.
Enable Inbox technical preview	Select this box to enable the user to perform advanced operations in their Inbox , like searching, filtering by one or multiple columns, filtering by dates or categories, and grouping.
	Clear this box so that the user can access the basic Inbox , which provides no search, filtering or grouping capabilities.

Translation Portal	spechy which type of translation Portal the user will be using:
	Basic – full create job functionality.
	Minimal – can create jobs but cannot give the job a name or description or upload reference material.
Email format	Select the user's email format. HTML is the preferred option.
Email frequency	Specify how often SDL TMS can email the user. In between mail times, messages for the user are stored. At mail time, all stored messages are put into a single email which is sent to the user. If no limit is specified, all messages are emailed immediately. A user's personal email frequency cannot be lower than frequency set for the system. If you try to set a lower frequency, an error message is displayed.
Allow Impersonation	Select this to allow someone else to access your SDL TMS account.
Download Packages	Select this to make SDL TMS check the Studio Packages in the Download options in the Inbox View.
TMS API Enabled	Select the TMS API Enabled box to generate a TMS API Key for this user to connect to SDL TMS using a third-party application. Important : The TMS API Enabled box itself is available only if the user's group has the Use TMS API permission set to Allow .
TMS API Key	Use this value to connect to the TMS API. Important: To get a TMS API Key make sure that in the Users Add/Edit page you select the TMS API Enabled option and then click Submit.
Segments per page	To make tasks easier to navigate, you can specify a maximum number of segments to be displayed on the Translation Interface screen. In tasks where the number of segments exceeds the limit, the segments are displayed in batches of the size specified here. Each batch of segments is displayed separately. The user can change this limit at any time via options on the Translation screen.
Display Terminology	If terminology is active for this organization, this option switches on/off the red line that appears over text in source segments. Where such a line appears, it indicates that the text was found in the terminology database during pre-processing.

Specify which type of Translation Portal the user will be using:

Show white space	Select this to display SDLX whitespace characters in the source segment text in the Translation screen. The whitespace characters are as follows:
	A red dot indicates a space.
	A red circle indicates a non-breaking space.
Hide source tags	Select this option to highlight formatted source language text in color and to display placeholders. The colors used are not significant; a particular color does not represent a particular type of formatting. Placeholders appear as vertical red bars, they indicate the presence of footnotes or graphics.
Enable autopropagation	Autopropagation is the process of copying the translation for the current segment to any other segments that have identical source text. If you select this option, SDL TMS will automatically Autopropagate whenever the user confirms a translation in the Translation screen.

NOTE ÷

Administrators can only modify the GroupShare Preferences while editing an already existing user. Individual users can add their GroupShare Preferences by editing the My details page only if they have the Publish to GroupShare permission.

Field	Description
Name	Type a meaningful, user-friendly name for your GroupShare server.
URL	Type the URL of your GroupShare server.
Port	Type a port number, if different from the default 80.
Use SSL	Select this checkbox if GroupShare requires a secure connection.
Default GroupShare Location	This value is updated when selecting a GroupShare location from the Publish to GroupShare window and setting it as the default location.

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→ NOTE

The **TAUS Credentials** tab contains the authentication details created by the user on the TAUS website. When clicking **Submit**, the TAUS credentials are validated with TAUS. An error is displayed if the credentials are not valid.

Field	Description
Email	Enter the email address that was used to create a TAUS account online.
Password	Enter the password that matches the email address used to create the TAUS account online.

The information on the **Additional Information** tab is used to filter users on the **Advanced Assign Users** screen. For example, if the project manager wants to create a list of users who speak French, then all users with French in the Language box would be displayed for assigning to project tasks.

→ NOTE

Only the first value entered will be found by the filter.

Field descriptions Additional Information tab:

Field	Description
Language	Enter the user's language. French (France), for example.
Rating	Select a star rating for this user. You can choose from one to five stars.
Subject	Enter the user's area of expertise. Aerospace, for example.
Vendor	The name of the vendor to which the user belongs. If they do not belong to a vendor, this box is not displayed.
User Attribute	If you have set up any user attributes fields, they are displayed here. Attributes fields hold data that you have decided to store.

Adding a New User

Before you start you should know the user's email address.

- 1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.
- 2 Check the currently selected organization to which the user will be added and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon **b** that precedes that organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed.
- 5 Click the Users link. The Users & Groups/Users screen is displayed.
- 6 Click the Add User button. The Users/Add screen is displayed. By default the User Details tab is displayed.
- 7 Complete the User Details tab. Refer to the Field Description table above for a description of each field that appears on the screen and how to complete it.
- **8** Display the **User Preferences** tab (click the tab name link at the bottom of the screen).
- **9** Accept the default settings or update them as required.
- **10** Display and complete the **Additional Information** tab.
- 11 Click the **Submit** button to save the new user.

Adding a New DS User

To add a DS user, the procedure is the same as described above with the following differences on the **User Details** tab:

- Instead of entering the user's name, you select the user from a drop-down list.
- The only fields you can update on the User Details tab are Private and Disable login.

Editing a User's Details

1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.

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- 2 Check the currently selected organization to which the user belongs and change it if necessary by selecting another organization from the drop-down list at the top of the navigation tree.
- 3 Click the plus icon ▶ that precedes that organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed.
- 5 Click the Users link. The Users & Groups/Users screen is displayed.
- 6 Click the user's name in the Name column. The Users details screen is displayed.
- 7 Click the Edit button to reach the Users/Edit button.



If this user belongs to a vendor, the vendor to which they belong is displayed in the **Vendor** box on the **Additional Information** tab. If they do not belong to a vendor, this box is not displayed.

8 Make the required changes on each tab and click the **Submit** button.

Disabling a User's Login

If you have the necessary permissions, an additional field appears on the **Users/Add** and **Users/Edit** screens: **Disable login**. Select this and click **Submit** to disable the user's login. Clear the box to reactivate the login again.

Deleting a User

Before you start, remove this user from any groups and reassign all of the user's current and future tasks to other users/groups. You cannot delete a user who is currently part of a group or who owns any tasks. Tasks are reassigned on the Reassign Tasks screen. Reassigning tasks is described in detail in *Chapter 7 Reassigning Tasks from One User to Another*.

- 1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.
- 2 Check the currently selected organization to which the user belongs and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- 3 Click the plus icon [▶] that precedes that organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed
- 5 Click the Users link. The Users & Groups/Users screen is displayed.

- 6 Click the user's name in the **Name** column. The **Users** screen is displayed.
- 7 Click the **Delete** button. A confirmation message is displayed.
- 8 Click Yes.

WORKING WITH GROUPS

All current groups are listed on the **Users & Groups/Groups** screen. From here you can select a group and edit the group details, add a new group or delete a group. This screen is displayed by clicking the **Groups** link on the **Users & Groups** screen.

Field	Description
Organization	Organization to which the group belongs.
Name	Group name.
Description	Description of group usage.
Static	Static data is system default data. Static data cannot be edited.
In use	A check mark $\ensuremath{\boxtimes}$ here indicates that this group has been assigned to a workflow.
Private	A check mark 🗹 here indicates that this group is private to this organization.

Adding a New Group

Groups are added on the Groups/Add screen. This screen is displayed when you click the Add Group button on the Users & Groups/Groups screen.

When you add a new group, you must assign permissions to the group. Permissions define what navigation tree options group members can see and what screens they can access. Permissions can be selected individually but there are also a number of standard permissions templates you can select. Each template assigns the minimum permissions needed to do a particular job. For example, there is a Translator template and a Project Manager template.



Vendor users are not added to groups. Vendor users acquire permissions by adding the user to a vendor. For more information, see the SDL TMS Administrator Guide.

Once you have selected a permissions template, you can still edit individual permissions if you want.

Field descriptions for the Groups/Add screen:

Field	Description
Name	Group name. Make this meaningful and clear.
Description	Add a description of the group's usage.
Private	Select this to make the group private to this organization.
Email address	By default email notifications of new work are sent to the individual email accounts of group members. If you want a project manager to be the only person notified of new work for the group, enter the project manager's email address here.
Available Users Selected Users	The users in the Available Users box may be added to the new group. To add a user, select the user name and click the right arrow. The Selected Users box contains a list of all users who have been selected to be members of the group.

Assigning Permissions to a Group

Permissions are assigned to groups on the **Edit Permissions** screen. This screen is displayed when you click the **Edit Permissions** button on the **Group name** screen. The **Group name** screen is displayed automatically when you **Submit** a new group.

The Group name /Edit screen contains the same fields as the Groups/Add screen.

->	NOTE	

- If the Edit Permissions button is grayed-out, you do not have the necessary permissions to edit permissions.
- □ You cannot give a group more powerful or just more permissions than you have yourself. For example, if you do not have the permission to create new jobs, you cannot give that permission to a group.

My	Organizat	ion ⊧ Us	ers & Grou	ps ► Grou	ips 🖡 All P	Permissions Group • Edit Permissions	; 0		1	
Back	G Refresh	H Info	Submit							
	Page		Action							
		P	ermission	Allow	Deny					
•			Attributes	✓				0		
•		Confi	gurations	✓				0		
•		Cost	Formulas	✓				0		
•		Co	st Models					0)	
۶.		Cost	Variables	•				0	•	
۶.		F	File Types	✓				0)	
Þ			Groups	✓				0)	
•			Jobs	•				0)	
•		Languag	e Groups	✓				0)	
•		Langu	age Pairs	V				0)	
•		Orga	anizations	•				0	1	
•			Portal	•				0	•	
÷		Project §	schedules					0)	
•			Projects	•				0	•	
•			QA Model	•				0		
•			Report	•				0		
•		R	lesources	•				0		
•			System	•				0		

Adding a New Group

- 1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.
- 2 Check the currently selected organization to which the group will be added and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click the plus icon **•** that precedes that organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed
- 5 Click the **Groups** link. The **Users & Groups/Groups** screen is displayed.
- 6 Click the Add Group button. The Groups/Add screen is displayed.
- 7 Complete the screen. Refer to the field description table above for an explanation of the fields on the screen and how to complete them.
- 8 Click the **Submit** button to save the new group. The **Group name** screen is displayed.
- 9 Click the Edit Permissions button. The Edit Permissions screen is displayed.
- **10** Click the down-arrow in the **Permissions Templates** field and select the required template for the group.
- 11 Click the **Submit** button to save the permissions.
 - > NOTE
 - If you want new work to be sent automatically to group members, you must now add the group to a workflow step.
 - □ If you cannot access the **Edit Permissions** screen, you must ask your SDL TMS system administrator to assign permissions on your behalf.

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Editing a Group

- 1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.
- 2 Check the currently selected organization to which the group belongs and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click **)** to expand the organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed
- 5 Click the Groups link. The Users & Groups/Groups screen is displayed.
- 6 Click the group name link in the Name column. The Groups screen is displayed.
- 7 Click the **Edit** button and make the required changes.
- 8 Click the **Submit** button to save the updated group.

Deleting a Group

Before you start, you must remove the group from any workflow steps and reassign any tasks currently owned by the group or due to come to the group in the future.

- 1 Click the **Setup** navigation button. The **Setup** navigation tree is displayed.
- 2 Check the currently selected organization to which the group belongs and change it if necessary by selecting another organization from the drop-down list on the navigation tree.
- **3** Click **•** to expand the organization.
- 4 Select the Users & Groups option. The Users & Groups screen is displayed
- 5 Click the Groups link. The Users & Groups/Groups screen is displayed.
- 6 Click the group name link in the Name column. The Groups screen is displayed.
- 7 Click the **Delete** button. A confirmation message is displayed.
- 8 Click Yes.

MAINTAINING TRANSLATION COSTS AND LANGUAGES

This chapter provides an overview of maintaining translation costs and languages. Sections include:

- Introducing Language and Translation Cost Maintenance
- Maintaining Translation Costs
- Maintaining Languages

Chapter

INTRODUCING LANGUAGE AND TRANSLATION COST MAINTENANCE

If you have the necessary permissions, you can view and update languages and translation costs. This guide gives an overview of the role of languages and costing in SDL TMS but you should refer to the SDL TMS Administrator Guide for a detailed description of how to add and update cost and language data.

MAINTAINING TRANSLATION COSTS

If you want SDL TMS to calculate translation cost figures for tasks and jobs and to produce invoice reports, you must set up following items:

- A task cost formula.
- A job cost formula.
- A cost model which has been added to a Configuration.

Task Cost Formula

A task cost formula defines how translation costs per task are calculated. The simplest task cost formula would be:

Calculate the translation cost for each word in a task and then add all of those amounts together.

It is possible to vary the formula by using base costs and variables. A base cost is a fixed amount added to the cost of translating a task. So the simple task formula becomes:

Calculate the translation cost for each word in a task, add all of those amounts together and then add the base cost.

Although variables can be used in task cost formulas, they are more commonly used in Job formulas and are described below.

Job Cost Formula

A job cost formula calculates the total translation cost for a job. In its simplest form a job cost formula could be:

Add all of the task translation costs together.

Or:

Add all of the task translation costs together and then add a 10% project management fee.

The 10% project management fee in the above example is a variable. Variables make it possible to tailor cost formulas to the individual requirements of clients or project managers. A variable is assigned a value which can then be used in cost formulas. For example, if jobs for a particular client are always higher priority than other jobs and attract a higher cost, you could create a variable that calculates 5% of the standard job cost and then adds this to the job cost total. A variable can be added to a formula or used as a divisor or multiplier in a formula.

Variable amounts can be fixed or dynamic. A fixed amount variable always represents the same figure in a cost formula. A dynamic variable has a figure assigned to it when it is created but you can change this figure 'on the fly' for individual jobs. Dynamic variable amounts are updated on the **Add Costs** tab of the **<Job name>/Edit** screen. This tab is only present if a dynamic variable has been used in the job cost formula. The **<Job name>/Edit** screen is displayed when you click the **Edit Job** button on the **<Job name> - Details** screen. A dynamic variable can be updated at any time and the recalculated job cost can be seen on the **<Job name> - Details** screen.

Variables are created by your SDL TMS system administrator. Cost formulas and variables are created and maintained via the **Costing** screen. This screen is accessed by clicking the **Setup** navigation button, selecting an organization from the drop-down list at the top of the navigation pane and selecting the **Costing** option from the navigation tree.

Cost Model

A cost model defines task level translations costs for one or more language pairs. A cost model contains:

- A list of language pairs.
- Translation costs per word for each language pair.
- The task cost formula to be used to calculate task costs.
- Any base amount used in the task cost formula.
- Priority cost amounts (if you are using priority costing in your cost formula).

Priority costing enables you to specify a higher cost for higher priority tasks, or a lower cost for lower priority tasks. You can specify a **High Priority figure** and a **Low Priority** figure on a cost model. These figures are variables that are used as multipliers in the task cost formula. If you want to use priority costings, you must select a task cost formula that includes the priority variable.

Cost Bands enable you to specify the cost for the number of translation memory matches in a matching category. Each band represents the degree of translation memory match expressed as a percentage (100%, 99% - 75% and 74% - 0%). If your organization is using PerfectMatch, this represents the top of the cost band, above 100%.

Once a Cost Model has been created, it must be added to a Configuration. All jobs created using the Configuration will have their translation costs calculated using the Cost Model. If a Configuration does not have a Cost Model added to it, all jobs created using the Configuration have no translation costs calculated for them.



NOTE

If a job was created using a Configuration that does not have a Cost Model added to it, there is no way to get the system to calculate translation costs later.

Cost Model screen example:

TW Organization + Setu	ap + Costing + Cost Models + Edit @	01
🔶 💭 🚯	Submit Divisio Add Cost	
Page	Model Actions	
Name	Passole Demo	0
Description	Demo	_
of her plane	0	0
Private	Language covered by the cost	model
Languages	Available Pairs and Groups (8) Selected Pairs and Groups (1)	0
	TW Organization (Language Pairs) (4) TW Organization (Language Pairs) (1)	2
	EN (US) > DE ES > FN RO > EN RO = EN RO > EN RO = EN	
Task Formula Number of Cost Bands	Dase cost + task cost	0
Costs per Task	4 V EN (US)> D(0
PerfectMatch	Task Cost Formula	0
	0.00	0
100 - 100 %		_
75 - 55 %	0.12	0
0 - 74 % €	0.00	0
Base Cost 🛛 €	0.00 Translation Cost per Word	0
Repeated Cost	0.00	0
High Priority	1.00	0
Normal Priority	1.00	0
Low Priority	1.00	0
Costs per Language Pair	EN (US) > DE	
Minimum Cost	0.00	0
		~

Cost models are accessed via the **Cost Models** screen. This screen is accessed by clicking the **Setup** navigation button, selecting an organization from the drop-down list at the top of the navigation pane, clicking the plus icon that precedes **Costing** and selecting the **Cost Models** option from the navigation tree.

> NOTE

It is possible to add more than one cost model to a Configuration. Only one of these can be the default cost model, but the others are available for selection by the authorizer when performing authorization or PJM authorization.

Invoice Amounts

Job costs can be seen on the **<Job name>** - **Details** screen. These costs are calculated when the job is created. When a job is authorized.

- If an alternative cost model is available, the authorizer may use this to recalculate the job cost.
- If dynamic cost variables exist for the job, the authorizer may update these with different amounts.

When the authorizer authorizes the tasks in a job, the authorized costs become the invoice amounts and are added to a special invoice table. When you run an invoice report, it uses the figures stored in this table. If you try to run an invoice report before authorization has taken place on a job, the report will be empty.

Invoice amounts generally remain fixed throughout the lifetime of a job, even if the job changes after it has been authorized. For example, if the authorizer authorized the translation of twenty tasks and ten of these are later terminated, an invoice report would still show the cost of translating twenty tasks.

MAINTAINING LANGUAGES

Language pairs are added and maintained via the **Languages** screen. This screen is accessed by clicking the **Setup** navigation button, selecting an organization from the drop-down list at the top of the navigation pane and selecting the **Languages** option from the navigation tree.

Usually, all of the language pairs you need will be set up by the SDL TMS system administrator during system set up, however, you can always add new languages later. Language setup is important in SDL TMS because:

- □ When translation memories are applied to a task, only translation memories for the same language pair are applied.
- Translation costs are defined at language pair level.

NOTE

Translation memories for language derivatives (sub-languages) may also be applied to a task; these usually have a translation memory match penalty applied to them. For example, a 75% match with a derivative language translation memory entry would become a 70% match if a 5% match penalty was applied.

Once a language pair has been added, generally the only maintenance you would perform for the language pair is to update the translation cost figures. This is done on the Cost Model.

Language Pairs and Language Groups

In the same way that users can be added to groups, language pairs can be added to language groups. The only place that language groups are used is on a Cost Model. By selecting a language group in the cost model, you can define a single set of translation costs for the group rather than defining a separate set of costs for each language pair in the group.

Languages and Workflows

If you want users and groups to be sent their new tasks automatically by SDL TMS, then a user or group must be assigned to each human step of a workflow for every language pair handled by the workflow.

In addition to assigning users and groups to standard workflow steps, you can also assign users to notification steps, if the workflow step configuration allows sending email notifications. For every standard step in a workflow (both human and system) there is a corresponding notification step and a user or group can be assigned to that step. This means that the person or group is notified by email whenever a task reaches the step.



REPORTS

This chapter contains the information you need to set up reports for your SDL TMS system. Sections include:

- Introducing Reports
- Running Reports
- Standard SDL TMS Reports
- Vendor Reports

Chapter

1

INTRODUCING REPORTS

You run reports in SDL TMS to get information about the jobs, tasks and projects in your system. You can run reports at any step. For example, you may want to run a **Job Quote** report whenever jobs are submitted to let a client know how much a job will be before they authorize it or you may want to run weekly **All Jobs Status** reports to see how the jobs in your organization are progressing through the system. The different standard reports which ship with SDL TMS and the function of each are outlined in the table below.

You can also use customized reports, which can be created to show you exactly the information you require. For more information about customized reports, please contact SDL Professional Services.



NOTE

You must have the relevant permissions to run SDL TMS reports. Usually, Project Managers will have these permissions.

Reports are accessed by clicking the **Reports** navigation button. When you select this option, different report categories are displayed in the navigation tree. Select a category from the navigation tree to display a list of corresponding reports. When you run a report, the report can be displayed on screen or it can be output to a Microsoft Excel spreadsheet.

	Root Organization + Reports			
Reports C	Back Refresh	B Info		
Invoicing Reports	Page			
 Job and Project Reports Management Reports 	E Reports			
Translation Memory Reports	Organization	Name 🔶	Description	
Custom Reports	Root Organiza 💌			
Vendor Reports	Root Organization	Job Invoice	Displays invoice data for a selected job. Invoice data is only available for jobs that have been through an invoicing workflow step	
	Root Organization	Job Quote	Shows the current cost estimate for a job, including linguistic analysis information and overall job costs.	
	Root Organization	Post-Translation Report - Job Level	Shows a detailed breakdown of the leverage achieved pre and post translation for each task in the job.	
	Root Organization	Post-Translation Report - Organization Level	Shows a job-by-job cost saving over a user-defined time period, split by language pair for each job in the organization. This report will only display Complete jobs and not jobs in progress.	
	Root Organization	Project Invoice	Shows the Invoice information for a selected project. This report is produced using invoice data.	
A Home				
Projects				
neports				
-				

Reports screen example:

🔂 Setup

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Description of the **Reports** screen:

Field	Description
Organization	Reports are run for a particular organization. However, you do not choose the organization here. You select the organization on the screen where you run the report.
Name	Report name. Click a link in this column to display the screen where the report is run.
Description	Description of the report contents.
Static	A check mark 🗹 here indicates that this is system default data and cannot be deleted.
Private	A check mark 🗹 here indicates that the report is private to this organization.

When you select a report from the **Reports** screen, the **Reports/<Report name>** screen is displayed. This is where you run the report.

This is an example of a **Reports**/<**Report name**> screen:

	Root Organization Reports All Jobs Status						
Reports System	Back Refresh Info	ubmit					
▼ 🛅 Reports	Daux Reliesh IIIU a	Anton .					
Invoicing Reports	Page A	Action					
Job and Project Reports	Name	All Jobs Status					
Management Reports	Name	All Jobs Status					
Translation Memory Reports	Description	Shows the status of all active tasks for the specified Organization.					
Custom Reports							
 Vendor Reports 	Organization	Root Organization					
	Report Format	CSV (Comma Separated Values)					
	Including Child Organizations						
A Home							
Projects							
🚰 Reports							

Description of the **<Report name>** screen:

Field	Description			
Name	Name of the report that is run from this screen.			
Description	Report description.			
Report Format	Select the format in which you want the report to be produced: CSV (Comma Separated Values) Excel (Microsoft Office XP+) Excel 2007 HTML PDF (Portable Document Format) RTF Word 2007 . Choose HTML to view the report in a browser window. All report formats produce a file for downloading. When you run a report it is automatically placed in a ZIP file which is added to the My Downloads page. The report will remain on this page until you delete it.			
Organization	The organization for which the report will be generated.			
Job, Project, TM, Workflow Step	Depending on the report you are generating you will also be asked to select a job, project, translation memory or a workflow step. For example if you are running a Job Invoice report, you will be asked to select the job for which the report will be run.			
Start Date	Where the report is limited to events that happened in a particular time frame, you must specify a start and end date for the period to be covered by the report. Click the Calendar icon to display the Calendar where you can select the period start date. For instructions on how to use the Calendar , See <i>The Calendar</i> on page 11-5.			
End Date	Last day of the period to be covered by the report. Click the Calendar icon to display the Calendar where you can select the period end date.			

The Calendar

When you click the **Calendar** icon in a date field, the **Calendar** is displayed. Use this to select the required report period start or end date. **Calendar** example:

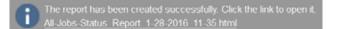
41	1	love	mber	2015	\checkmark	×
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12
				09	: 3	1 韋

To select a date, click the date. If the date you require is in a different month, use the right and left arrows to go forward to the next month or back to the previous month.

When you have selected a date, click 🗹 to save your selection and close the **Calendar**.

RUNNING REPORTS

- 1 Click the **Reports** navigation button and select a report category from the navigation tree. The **Reports** screen for the selected category is displayed.
- 2 Click the name of the report to be run. The **Reports/<Report name>** screen is displayed.
- 3 Select a report format. Select HTML to display the report in a browser window.
- **4** Depending on the report you are generating, select the organization, job, project, translation memory or workflow step for which you want to run to report.
- 5 If the report requires you to specify a date range, select the Start Date and End Date.
- **6** Click **Submit** to run the report. An information message is displayed as the report is generating.
- 7 When the report is ready for downloading a new information message is displayed:



- 8 Click the file name link in the information message to download the report:
 - □ If you opted to display the report on screen by selecting HTML, it will be displayed in a new browser window. Close the window when you have finished viewing the report.
 - □ If you opted to output the report to an Excel file, a new browser window is opened and the **File Download** dialog box is displayed. You can open the Excel file or save it.

→ NOTE

A copy of the report is also added automatically to your **My Downloads** screen. It will remain there until you delete it.

SAVING REPORTS

If you want to retain report information after jobs are complete, you must save the report file to a location on your network or hard drive because the report will no longer be available in SDL TMS once a job has been archived. SDL recommends that you save reports by organization or job.

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STANDARD SDL TMS REPORTS

SDL TMS is shipped with a set of standard reports. These standard reports are divided into the following categories:

- Invoicing Reports
- Job and Project Reports
- Management Reports
- Translation Memory Reports
- Vendor Reports



NOTE

If customized reports have been created for your organization, these are accessed from the **Custom Reports** category on the navigation tree. For more information about creating customized reports, please contact SDL Professional Services.

Invoicing Reports

The following table lists the standard reports in the Invoicing Reports category in SDL TMS:

Report	Description
Job Invoice	Shows the invoice information for the selected job. This report is produced using invoice data. See <i>Job Invoice Report</i> on page 11-12.
Job Quote	Shows the current cost estimate for a job, including linguistic analysis information and overall job costs. See <i>Job Quote Report</i> on page 11- 13. NOTE: The Job Quote can also be ran from the Job's Details page.
Post-Translation Report - Job Level	Shows how the translation analysis and invoice cost figures for a job changed in between the initial translation analysis being performed and translation memory being applied to tasks during translation. During translation, if the translation memory matches had improved, this would result in a lower translation cost. The amount of this cost saving also appears in the report. See <i>Post-Translation Job and</i> <i>Organization Reports</i> on page 11-14.

Post-Translation Report - Organization Level	Organization level version of the Post-Translation Report - Job Level report. This version of the report shows summary information for several jobs. See <i>Post-Translation Job and Organization Reports</i> on page 11-14.
Project Invoice	Shows the invoice information for a selected project. This report is produced using invoice data. See <i>Post-Translation Job and Organization Reports</i> on page 11-14.

Job and Project Reports

The following table lists the standard reports in the Job and Project Reports category in SDL TMS:

Report	Description
All Jobs Status	Shows the status of all active tasks for the specified organization. For more information, See <i>All Jobs Status Report</i> on page 11-19.
Job Status	Shows a breakdown of the number of tasks at each workflow step for the job specified. See <i>Job and Project Reports</i> on page 11-19.
Jobs Overdue	Shows a list of jobs that became overdue during the specified date range. See <i>Jobs Overdue Report</i> on page 11-20.
QA Check Failed - Date Range	Shows details of all tasks in all jobs that failed a QA check in a specified date range. See <i>QA Check Failed – Date Range Report</i> on page 11-21.
QA Check Failed - Job	Shows details of tasks in a single job that failed a QA check in a specified time period. See <i>QA Check Failed – Job Report</i> on page 11-21.
Reviewer Grading - Organization Level	This report gives summarized reviewer feedback data for translations completed in a specified date range. Reviewer Feedback reports are only available if your company has chosen to use QA Models.
Reviewer Grading - Task Level	This report gives detailed reviewer feedback scores for a single task. Reviewer Feedback reports are only available if your company has chosen to use QA Models.

Terminated Reason	Lists jobs that were terminated at the Authorization step or the PJM Authorization step. See <i>Reviewer Grading - Task Level Report</i> on page 11-22.
Word Count	This report displays the word counts for each task in a job. These word counts are calculated during task pre-processing. See <i>Terminated Reason Report</i> on page 11-25.

Management Reports

The following table lists the standard reports in the **Management Reports** category in SDL TMS:

Report	Description
Audit Trail	Shows the time a given object has been added, edited or deleted, as well as the user who has performed the operation within a specific date range.
Files in Exception and Files in Exception - Date Range	This report lists all tasks that are currently at the Exception workflow step. It shows which step was in progress when the exception occurred and when the exception occurred. In the date range version of the report, only exceptions that occurred on or between the specified dates are included in the report.
Files in Recovery and Files in Recovery - Date Range	This report lists all tasks that are currently at the Recovery workflow step. It shows which step was in progress when the task failed and when the task failed. In the date range version of the report, only tasks that went to the Recovery step on or between the specified dates are included in the report.
Recovery & Exception Summary Report	This report shows how many tasks went to either the Recovery workflow step or the Exception step during a specified date range. The report contains data for the organization that was selected when the report was run and for all of its sub-organizations.
Production Cycle	Shows how long users took to perform each 'human' workflow step (for example translation and review) in a job. The report includes all jobs that were worked on during specific date range. See <i>Production</i> <i>Cycle Report</i> on page 11-33.

Task History	Shows the date and time that tasks started each human step for a specific date range. See <i>Task History Report</i> on page 11-34.
Translation History	Shows the status of the segment source and target text in every workflow step. Also shows who worked on the segment in the step. See <i>Translation History Report</i> on page 11-36.
Translation Memory Savings	Shows the translation memory leverage and savings per target language for a selected organization. The data is based on jobs which have been authorized. This report is produced using invoice data. See <i>Translation History Report</i> on page 11-36.
Translation Summary by Language	Shows the translation summary statistics for each target language. This report is produced using invoice data. See <i>Translation Summary</i> <i>by Language Report</i> on page 11-39.
User Work History	Shows which users were responsible for a given workflow step within a specific date range. See <i>User Work History Report</i> on page 11-40.
Vendor Summary	Shows the list of all vendors for the specified organization. See <i>User Work History Report</i> on page 11-40.

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Translation Memory Reports

The following table lists the standard reports in the **Translation Memory Reports** category in SDL TMS:

Report	Description
TM Segments Created	Shows the translation memory segments created between the dates specified. See <i>TM Segments Created Report</i> on page 11-43.
TM Segments Created and Used	Shows the translation memory segments created and used between the dates specified. See <i>TM Segments Created and Used Report</i> on page 11-43.
Translation Memory Size	Shows the number of segments in a translation memory for each target language. See <i>Translation Memory Size Report</i> on page 11-44.

Vendor Reports

The following table lists the standard reports in the **Vendor Reports** category in SDL TMS. These reports are the only reports available to vendor users:

Report	Description
Vendor Invoice	This report displays invoice data for all of the completed tasks in the selected job. A completed task is one in respect of which all work has been finished and the translated file has been downloaded for distribution to the client. See <i>Vendor Reports</i> on page 11-45.
Vendor Job Status	This report shows the status of all tasks in the selected job that are currently with you for action. Tasks that have been completed do not appear in the report. See <i>Vendor Reports</i> on page 11-45.
Word Count	This report displays the word counts for each task in a job. These word counts are calculated during task pre-processing. See <i>Vendor Reports</i> on page 11-45.

INVOICING REPORTS

The Invoicing Reports contain invoice information for jobs and projects.

Job Invoice Report

This report shows the invoice information for a selected job. It is produced using invoice data. Invoice data is a permanent record (held in the database) of the costing information for a job that is created by including the **Cost Calculation** and **Complete Invoice** steps in the workflow for the job.



- You must include the Cost Calculation and Complete Invoice steps in any job for which you want to create this report. For complete and meaningful report data, the Complete Invoice step must be passed before the report can be run.
- □ If a job was terminated after some tasks in the job had already completed the **Complete Invoice** step, you can run the **Job Invoice** report in respect of the terminated job because the invoice data for the job will have been retained.

When you select **Invoicing Reports** from the navigation tree and click on the **Job Invoice** link in the **Reports** screen, the **Reports/Job Invoice** screen is displayed.

Description of the **Job Invoice** report:

Field	Description
Job name	The name of the job for which the report was generated.
Language Pair	The invoice data on this row of the report is for this language pair.
Word Count	Total number of words in the tasks for this language pair.
Repetitions	The number of repeated words in the file(s).
PerfectMatch	The number of words translated during pre-processing using PerfectMatch. This column will only appear if PerfectMatch is in use at your company.
100%	The number of words translated with a 100% translation memory match during pre-processing.
99-75%	The number of words translated with a fuzzy translation memory match (between 99 and 75%) during pre-processing.
74-0%	The number of new words in the task. These are words in segments for which no match was found in the translation memory.

% TM Leverage	The percentage of words in the file(s) that were translated by applying a translation memory.
TM Saving	The amount of money that was saved by using translations taken from the translation memory. Cost calculations are based on the cost model that was active when the job was created.
Cost	The cost of translating the file(s).
Cost Variable	The names of any cost variables that exist in the job cost formula used to calculate the total job cost.
Comment	Any comment added for the cost variable.
Cost	The value of the cost variable.
Total	The total invoice amount including variables.

Job Quote Report

This report shows the current cost estimate for a job, including linguistic analysis information and overall job costs.



NOTE

The Job Quote report can also be ran from the Job's Details page. Terminated tasks are not included in this report.

When you select **Invoicing Reports** from the navigation tree and click on the **Job Quote** link in the **Reports** screen, the **Reports/Job Quote** screen is displayed. Description of the **Job Quote** report.

Field	Description
Organization	Organization for which the report was run.
Job name	The job for which the report was run.
Language Pair	The data on this row of the report is for this language pair.
Total Words	Total number of words to be translated for this language pair.
Repetitions	The number of repeated words in the file(s).

PerfectMatch	The number of words translated during pre-processing using PerfectMatch. This column will only appear if PerfectMatch is in use at your company.
100%	The number of words translated with a 100% translation memory match during pre-processing.
99-75%	The number of words translated with a fuzzy translation memory match (between 99 and 75%) during pre-processing.
74-0%	The number of new words in the task. These are words in segments for which no match was found in the translation memory.
% TM Leverage	The percentage of words in the file(s) that were translated by applying a translation memory.
TM Saving	The amount of money that was saved by using translations taken from the translation memory. Cost calculations are based on the cost model that was active when the job was created.
Cost	The cost of translating the tasks.
Cost Variable	The names of any cost variables that exist in the job cost formula used to calculate the total job cost.
Comment	Any comment (usually a description) added for the cost variable.
Total	The value of the cost variable.
Total	The total invoice amount including variables.

Post-Translation Job and Organization Reports

The Post Translation reports show the difference (if there is a difference) between the leverage that existed during the task pre-processing step and the translation memory match figures that existed when the tasks were actually translated. If the translation memories applied to the job have been updated in between the initial analysis being performed and the tasks being translated, the translation memory match figures may have improved by the time translation takes place. This may happen if a considerable time has elapsed between a job being created and the tasks being translated.

There is a job level version of the report and an organization level version. The organization level version summarizes totals for a number of jobs in the same organization. Only jobs that are complete (all translations completed) are included in the Organization level report.

- Post Translation data is only available for jobs that were created using a Configuration on which Post Translation Analysis has been enabled and a workflow containing the Post Translation Analysis step.
- Terminated tasks are excluded from the reports.
- Tasks which have not yet been through the **Translation** and **Post Translation Analysis** workflow steps, will have no post-translation data available.

Post Translation Report - Job Level

Select **Invoicing Reports** from the navigation tree and click on the **Post Translation Report - Job Level** link in the **Reports** screen, the **Reports/Post Translation Report - Job Level** screen is displayed.

Description of the Post Translation Report - Job Level report:

Field	Description
Job name	This report has been produced for the job named here.
Task	Name of the file being translated.
Language Pair	The data on this row of the report relates to this language pair.
Pre Translation & Post Translation	The New, Fuzzy, Hundred, PerfectMatch and Cost columns are the Pre Translation analysis and invoice cost figures calculated when the job was created. The next four columns display the Post Translation versions of these figures, calculated when the document was translated. If the task has not been through the Complete Invoice step there will be no pre-translation cost data. If N/A appears in the Post Translation columns, the task has not yet reached the translation step.
New	The number of words in the task that did not exist in the translation memory.
Fuzzy	The number of words for which a fuzzy (between 99% and 75%) translation memory match existed.
100%	The number of words for which a 100% translation memory match existed.
PerfectMatch	The number of words translated during pre-processing using PerfectMatch.
Cost	Cost of translating the task based on the preceding cost analysis figures.

Saving Amount by which the translation cost was reduced because better leverage was achieved when translation took place than existed when the translation memory match figures were generated during task preprocessing.

Post Translation Report - Organization Level

When you select **Invoicing Reports** from the navigation tree and click on the **Post Translation Report** - **Organization Level** link in the **Reports** screen, the **Reports/Post Translation Report** - **Organization Level** screen is displayed.

Description of the Post Translation Report - Organization Level report:

Field	Description
Date	Date the last task in the job passed the translation step. Only jobs for which all translations have been completed are included in the report.
Job Name	A job that was completed during the period covered by the report.
Language Pair	One language pair in the job. Savings for each language pair are shown on separate rows.
Saving	Amount by which the translation costs were reduced because better leverage was achieved when translation took place than existed when the translation memory match figures were generated during task pre- processing.

Project Invoice Report

This report shows the invoice information for a selected project (that is, the total invoice information for all jobs in a project). It is produced using invoice data. Invoice data is a permanent record in the database of the costing information for a job that is created by including the **Cost Calculation** and **Complete Invoice** steps in the workflow for the job.



You must include the Cost Calculation and Complete Invoice steps in any job for which you want to create this report. The Complete Invoice step must be passed before the report can be run.

Archived tasks are not included in the report.

When you select **Invoicing Reports** from the navigation tree and click on the **Project Invoice** link in the **Reports** screen, the **Reports/Project Invoice** screen is displayed.

Description of the Project Invoice report:



NOTE

The columns displayed in your report may vary depending on what workflow steps are included in the jobs in your project.

Field	Description
Organization	Organization for which the report was run.
Project	Project for which the report was run.
Language Pair	The invoice data on this row of the report is for this language pair.
Total Words	Total number of words in project tasks for this language pair.
Repetitions	The number of repeated words in the file(s).
PerfectMatch	The number of words translated during pre-processing using PerfectMatch. This column will only appear if PerfectMatch is in use at your company.
100%	The number of words translated with a 100% translation memory match during pre-processing.
99-75%	The number of words translated with a fuzzy translation memory match (between 99 and 75%) during pre-processing.

74-0%	The number of new words in the task. These are words in segments for which no match was found in the translation memory.
% TM Leverage	The percentage of words in the file(s) that were translated by applying a translation memory.
TM Saving	The amount of money that was saved by using translations taken from the translation memory. Cost calculations are based on the cost model that was active when the job was created.
Cost	The cost of translating the file(s).
Cost Variable	The names of any cost variables that exist in the job cost formula used to calculate the total job cost.
Comment	Any comment added for the cost variable.
Cost	The value of the cost variable.
Total	The total invoice amount including variables.

JOB AND PROJECT REPORTS

The reports in the **Job and Project Reports** category contain details on job statues, QA checks and translation quality in SDL TMS.

All Jobs Status Report

This report shows the status of all active tasks for the organization for which it is generated. An active task is one which has not been terminated and has not yet completed the final step of the workflow used to manage the task.



NOTE

Depending upon the number of jobs in the system, this report may take longer than other reports to generate.

When you select **Job and Project Reports** from the navigation tree and click on the **All Jobs Status** link in the **Reports** screen, the **Reports/All Job Status** screen is displayed.

Description of the All Jobs Status report:

Field	Description
Organization	The name of the organization for which the report was run.
Job name	The data on this row of the report relates to a task in this job.
Task	The data on this row of the report relates to this task.
File name	The name of the file being translated.
Target Language	The language into which the file is being translated.
Current status	The workflow step currently in progress for this task.
Time Spent at Current Step	The task has been at this step for this length of time.

Job Status Report

This report shows a breakdown of the number of tasks at each workflow step for the selected job.



NOTE

You cannot run this report for archived jobs.

When you select **Job and Project Reports** from the navigation tree and click on the **Job Status** link in the **Reports** screen, the **Reports/Job Status** screen is displayed.

Description of the Job Status report:

Field	Description
Organization	The name of the organization for which the Job Status report has been generated.
Job	The job for which the report was run.
Workflow Step	One or more tasks in the job are currently at this step.
Task Count	The number of tasks at the workflow step.
%	The percentage of the task(s) in the job at that workflow step.

Jobs Overdue Report

This report lists jobs that became overdue when one or more tasks in the job failed to meet their specified deadline for completion. Details of the overdue tasks are given for each job.

When you select **Job and Project Reports** from the navigation tree and click on the **Jobs Overdue** link in the **Reports** screen, the **Reports/Job Overdue** screen is displayed.

Description of the Jobs Overdue report:

Field	Description
Organization	The organization for which the report was run.
Start Date End Date	Date range specified when the report was run. The report lists jobs that became overdue on or between these dates.
Job Name	Name of an overdue job.
Due Date	Date by which the job is due to be completed.
File name	Source file for the overdue task.
Target Language	The language into which the file is to be translated.
Current status	The workflow step where the task is now.
User	The user who currently 'owns' this task.
Email	The email address of that user.

Word Count	The number of words in the file.
Date Sent	The date on which the task was sent to SDL TMS.

QA Check Failed – Date Range Report

This report contains details of all tasks that failed a QA check on or between the start and end dates specified when the report was run. The information displayed for each task is the same as appears in the **QA Check Failed - Job Range** report. The failed tasks are grouped by job.



You cannot run this report for archived or terminated jobs.

When you select **Job and Project Reports** from the navigation tree and click on the **QA Check Failed** - **Date Range** link in the **Reports** screen, the **Reports/QA Check Failed** - **Date Range** screen is displayed.

QA Check Failed – Job Report

This report shows details of tasks, in a single job, that failed a QA Check. QA checks are run on completed translations.



NOTE

You cannot run this report for archived or terminated jobs.

When you select **Job and Project Reports** from the navigation tree and click on the **QA Check Failed** - **Job** link in the **Reports** screen, the **Reports/QA Check Failed** - **Job** screen is displayed.

Description of the QA Check Failed - Job report:

Field	Description
Organization	Organization for which the report was run.
Job Name Task ID	This is a task which failed a QA check. Details of the failure are given in the remaining columns on this row of the report. Each task is given a unique Task Id when it is created. The Job Name tells you which job the task belongs to.

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Type of QA Check	The reason why the task failed the QA Check is displayed here. QA checks are made at segment level and the possible failure types are:	
		Segment not translated – the text in a target segment is exactly the same as the text in the source segment.
		Segment not confirmed – the translation was not confirmed by the translator.
		Term translation not used – the segment contains a term for which a translation exists in your termbase, but the translation was not used.
Current Status	t Status Indicates the current status of the task for the failed QA check:	
		Failed but subsequently passed – this task initially failed the QA check but the segments in error were corrected and the task has now successfully completed the check.
		Currently failed – this task failed the QA check and the segments in error have not yet been corrected or the check overridden.
		Overridden – this task failed the QA check but the translator subsequently overrode the check. The reason for the QA check override is given below.
Reason the check was overridden	-	check was overridden, the reason the translator gave for the s displayed here.
Failed Segment	The ID of	a segment that failed this check for this task.
User Name	Name of	the translator.
Date	The date	the segment failed the check.

Reviewer Grading - Task Level Report

This report shows reviewer feedback data for a selected task. The content of the report is determined by the QA Model that was used to collect the feedback. Each QA Model has different categories of error and different severity levels.

This report is the task level version of the Reviewer Grading - Organization Level report.

This report is only available if your company is using QA Models to collect reviewer feedback on completed translations.

NOTE

Archived jobs are not included in this report.

To run this report, select Job and Project Reports from the navigation tree and then click Reviewer Grading - Task Level in the Reports screen. The Reviewer Grading - Task Level screen is displayed.

Description of the Reviewer Grading - Task Level report:

Field	Description	
Organization	The organization for which the report was run.	
Job name	The job that contains the task for which the report was run.	
Task	The data in this report relates to this task.	
File name	The task source file.	
Language Pair	The task source and target languages.	
Vendor	If a vendor was responsible for the translation, the vendor's name appears here.	
Translator	The username of the person who performed the translation.	
Reviewer	The username of the person who gave the language review.	
QA Model	The QA Model that was used to capture reviewer feedback.	
Word Count	The total number of words in the task.	
Score	The total feedback score accumulated for the task.	
Threshold	This figure defines the level of quality a translation must achieve in order to be a success:	
	If the figure here is a percentage, the task must achieve an overall translation quality score that is equal to or higher than this figure. If the score is lower than this figure, the translation has not achieved the required level of quality.	
	If the figure is not a percentage, it represents the maximum error score a task can accumulate and still be of acceptable quality. If the error score is greater than this figure, the translation has not achieved the required level of quality.	
Quality (%)	The quality of the task translation expressed as a percentage. The lower the percentage the worse the translation quality.	

Acceptable	Yes/No - Indicates whether the task achieved the required level of quality.
Category Group	Related checks are grouped together by category. For example, Style and Linguistic checks. The name that appears here is the name of the category to which, the check on this row of the report belongs.
Category	Individual check type. For example, Spelling Error.
Count	The number of errors of this category/severity in the task.
Score	The score accumulated by errors of this category/severity.
Total Count	Total number of errors in this category.
Total Score	Total score for this category of error.

Reviewer Grading - Organization Level Report

This report shows summarized reviewer feedback data for tasks completed in a particular date range. The content of the report is determined by the QA Model that was used to collect the feedback. Each QA Model has different categories of error and different severity levels.

This report is the organization level version of the Reviewer Grading - Task Level report.

This report is only available if your company is using QA Models to collect reviewer feedback on completed translations.

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NOTE

Archived jobs are not included in this report.

To run this report, select **Job and Project Reports** from the navigation tree and then click **Reviewer Grading - Organization Level** in the **Reports** screen. The **Reviewer Grading - Organization Level** screen is displayed for completion.

Description of the Reviewer Grading - Organization Level report:

Field	Description
Organization	The organization for which the report was run.
Job name	A job containing tasks for which reviewer feedback was given in the specified date range.

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Task	The data on this row of the report relates to this task.	
File name	Source file sent for translation.	
Language Pair	The task source and target languages.	
Vendor	If a vendor was responsible for the translation, the vendor's name appears here.	
Translator	The username of the person who performed the translation.	
Reviewer	The username of the person who performed the language review.	
QA Model	The QA Model that was used to capture reviewer feedback.	
Word Count	The total number of words in the task.	
Score	The total feedback score accumulated for the task.	
Threshold	This figure defines the level of quality a translation must achieve in order to be a success:	
	If the figure here is a percentage, the task must achieve an overall translation quality score that is equal to or higher than this figure. If the score is lower than this figure, the translation has not achieved the required level of quality.	
	If the figure is not a percentage, it represents the maximum error score a task can accumulate and still be of acceptable quality. If the error score is greater than this figure, the translation has not achieved the required level of quality.	
Quality (%)	The quality of the task translation expressed as a percentage. The lower the percentage the worse the translation quality.	
Acceptable	Yes/No - Indicates whether the task achieved the required level of quality.	

Terminated Reason Report

This report lists jobs containing tasks that were terminated at either the Authorization or the PJM Authorization step. This means that their translation was never authorized and no work was ever performed on the tasks. The reason given for terminating the tasks is also in the report.

When you select **Job and Project Reports** from the navigation tree and click on the **Terminated Reason** link in the **Reports** screen, the **Reports/Terminated Reason** screen is displayed.

Description of the Terminated Reason report:

Field	Description
Job Name	Job containing tasks terminated at either the Authorization or PJM Authorization step.
Project Manager	Project manager assigned to the job.
Created Date	Date on which the job was created.
Client Contact	Contact details for the client.
Description	Description given to the job when it was created.
Job Cost	Total invoice value of the job.
Reason	The reason given for terminating the job.

Word Count Report

This report displays the word counts for each task in a job. These word counts are calculated during task pre-processing.



NOTE

Terminated tasks are excluded from this report.

When you select **Job and Project Reports** from the navigation tree and click on the **Word Count** link in the **Reports** screen, the **Word Count Report** screen is displayed.

Description of the Word Count report:

Field	Description
Organization	Organization for which the report was run.
Job name	The job for which the report was run.
Language Pair	The source and target languages of the task on this row of the report.
Task Identity	Unique number that identifies the task on this row of the report.
Item name	The source file submitted for translation. The task is one target language version of this file.
Word Count	The number of words in the task.

Repetitions	The number of repeated words in the file(s).
PerfectMatch	The number of words translated with using PerfectMatch translations.
100%	The number of words translated with a 100% translation memory match.
99-75%	The number of words for which there was a percentage match between 75% and 99%.
74-0%	The number of words for which no match was found in the translation memory.

MANAGEMENT REPORTS

The reports in the **Management Reports** category contain details on files which were sent to the Exception and Recovery workflow steps, the production cycle, work history and translation memory savings in SDL TMS.

Audit Trail

The **Audit Trail** shows the time a given object has been added, edited or deleted as well as the user who has performed the operation within a specific date range.

To run the **Audit Trail** report, select **Management Reports** from the navigation tree and then click **Audit Trail** on the **Reports** screen. The **Audit Trail** screen is displayed.

Description of the Audit Trail report:

Field	Description		
Organization	Organization for which the report was run.		
Object Type	From the list, choose the object type for which you want to run the report.		
Start Date End Date	This is the date range covered by the report. Changes to the selected object occurring on or between these dates are included in the report.		
Including Child Organizations	Select this check box to include data from child organizations in the audit report.		

EMT Word Count

The **EMT Word Count** report provides word count data for each task which has been sent to an external MT provider. The date range refers to the date the MT was returned to TMS.

To run the **EMT Word Count** report, select **Management Reports** from the navigation tree and then click **EMT Word Count** on the **Reports** screen. The **EMT Word Count** screen is displayed.

Description of the EMT Word Count report:

Field	Description
Organization	Organization for which the report was run.

Report Format	From the list, choose the format you want the report to be displayed.
Including Terminated Tasks	Select this box to include data from tasks that were terminated.
Start Date End Date	This is the date range covered by the report.

Files in Exception & Files in Exception Date Range Reports

The **Files in Exception** report lists all tasks that are currently at the **Exception** workflow step. It shows which step was in progress when the exception occurred and when the exception occurred. The date range version of this report lists files that went to the **Exception** step during a specified time period.



Archived jobs are not included in this report.

To run the **Files in Exception** report, select **Management Reports** from the navigation tree and then click **Files in Exception** on the **Reports** screen. The **Reports/Files in Exception** screen is displayed.

To run the date range version of this report, select **Management Reports** from the navigation tree and then click **Files in Exception - Date Range** on the **Reports** screen. The **Reports/Files in Exception - Date Range** screen is displayed.

Descriptions of the Files in Exception and the Files in Exception - Date Range reports:

Field	Description		
Organization	Organization for which the report was run.		
Start Date End Date	This is the date range covered by the report. Exceptions occurring on or between these dates are included in the report. These dates only appear in the Date Rang e version of the report.		
Job	The data on this row of the report belongs to this job. A job ID is a numerical identifier given to a job by the system. To see Job IDs, add the Job ID column to the Jobs screen.		
Job Name	The job name.		
Date Sent	Date the job was sent to SDL TMS.		
Due Date	Date by which all work on the job should be completed.		

Task	The task which produced an exception.		
Filename	This is the source file being translated in this task.		
Step Start	Date and time the step started.		
Days	Number of days the task has been at this step (the number of days the task has been in Exception).		
Comment	Text generated by the script that caused the Exception to occur. The comment should contain an error code and error reason.		

Files in Recovery & Files in Recovery Date Range Reports

The **Files in Recovery** report lists all tasks that are currently at the **Recovery** workflow step. It shows which step was in progress when the task failed and when the task failed. In the date range version of the report, only tasks that went to the **Recovery** step on or between the specified dates are included in the report.



NOTE

Archived jobs are not included in this report.

To run the **Files in Recovery** report , select **Management Reports** from the navigation tree and then click **Files in Recovery** on the **Reports** screen. The **Reports/Files in Recovery** screen is displayed.

To run the date range version of this report, select **Management Reports** from the navigation tree and then click **Files in Recovery - Date Range** on the **Reports** screen. The **Reports/Files in Recovery - Date Range** screen is displayed.

Descriptions of the Files in Recovery and the Files in Recovery - Date Range reports:

Field	Description		
Organization	Organization for which the report was run.		
Start Date End Date	This is the date range covered by the report. Tasks sent to the Recovery step on or between these dates are included in the report. These dates only appear in the Date Rang e version of the report.		
Job	The data on this row of the report belongs to this job. A job ID is a numerical identifier given to a job by the system. To see Job IDs, add the Job ID column to the Jobs screen.		
Job Name	The job name.		
Date Sent	The date the job was sent to SDL TMS.		
Due Date	Date by which all work on the job should be completed.		
Task	The task which was sent to the Recovery step.		
Filename	This is the source file being translated in this task.		
Step Start	Date and time the task was sent to the Recovery step.		
Days	The number of days the task has been in Recovery .		
Comment	Text describing the error which caused the task to be sent to Recovery .		

Recovery and Exception Summary Report

This report shows how many tasks went to either the **Recovery** or **Exception** workflow step during a specified date range. The report contains data for the organization that was selected when the report was run and for all of its sub-organizations.



Archived jobs are not included in this report.

To run the **Recovery and Exception Summary** report, select **Management Reports** from the navigation tree and then click **Recovery and Exception Summary** on the **Reports** screen. The **Reports/Recovery and Exception Summary** screen is displayed.

Description of the Recovery and Exception Summary report:

Field	Description		
Organization	Organization for which the report was run. The report includes data for this organization and its sub-organizations.		
Start Date End Date	This is the date range covered by the report. Tasks sent to either the Recovery or Exception step on or between these dates are included in the report.		
Organization	The data on this row of the table belongs to this organization.		
Recovery Tasks	The number of tasks that went to the Recovery step during the specified date range.		
% of Total Tasks	The number of tasks that went to the Recovery step during the specified date range, expressed as percentage of all tasks created during the same period.		
Recovery Jobs	The number of jobs containing tasks that went to the Recovery step during the specified date range.		
% of Total Jobs	The number of jobs that went to the Recovery step during the specified date range, expressed as percentage of all jobs created during the same period.		
Organization	The data on this row of the table belongs to this organization.		
Exception Tasks	The number of tasks that went to the Exception step during the specified date range.		

% of Total Tasks	The number of tasks that went to the Exception step during the specified date range, expressed as percentage of all tasks created during the same period.
Exception Jobs	The number of jobs containing tasks that went to the Exception step during the specified date range.
% of Total Jobs	The number of jobs that went to the Exception step during the specified date range, expressed as percentage of all jobs created during the same period.

Production Cycle Report

For jobs that were created during the specified date range, this report shows how long it took users to perform each 'human' workflow step in the jobs.

NOTE

Archived jobs are not included in this report.

When you select Management Reports from the navigation tree and click on the Production Cycle link in the Reports screen, the Reports/Production Cycle screen is displayed.

Description of the Production Cycle report:

Field	Description		
Start Date End Date	The date range specified when the report was run. Jobs created on or between these dates are included in the report.		
Job Name	The data on this row of the report relates to this job.		
Workflow Step Names	A column appears for each workflow step present in the jobs in the report. In each column you can see how long each step took to complete. If no work has taken place on a step, Not Started appears here.		
Total	The amount of time that has passed since the job began.		

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NOTE

The Production Cycle report content will differ according to the workflow steps that are present in the workflows supported by the configurations used by the organization for which the report is being run. All human workflow steps in use in the organization are displayed. All jobs may not use all of these workflow steps, and for this reason, some of the columns may be blank.

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Task History Report

This report shows the date and time that tasks started each 'human' step that occurred within the specified date range. If a step is repeated for some reason, the repeated steps will also appear on the report. The report data is sorted and displayed by job ID and within each job by file name and language pair. Each row of the report represents one task that existed on or between the dates specified when the report was run.



NOTE

In order to run this report, you must have selected the **Create Permanent Task History** box in the **System/Settings** page.

When you select **Management Reports** from the navigation tree and click on the **Task History** link in the **Reports** screen, the **Reports/Task History** screen is displayed.



NOTE

The workflow steps in the **Task History** report will vary according to workflow steps in the configurations in the organization for which the report is being run. All human workflow steps in use in the organization are displayed and these will differ for differing organizations.

Description of the Task History report:

Field	Description		
Organization	The name of the organization for which the Task History report has been generated.		
Start Date End Date	This is the date range specified when the report was run. All tasks that existed on or between these dates are included in the report.		
File Name	The name of the file being translated in this task.		
Language Pair	The task source and target languages of the task.		
Јор	The job to which this task belongs. The Job ID is displayed. A job ID is a numerical identifier given to all jobs. To see Job IDs add the Job ID column to the Jobs screen.		
File Translation Cost	The cost of translating the file.		
Date Sent	The date the file was sent to SDL TMS for translation.		

Workflow Step name In	A column appears for each workflow step in the workflow being used to process the task. For each step, the date and time the task entered the step is displayed.		
Total Words	The total number of words in the task.		
Banding Word Counts	The number of translation memory matches in a matching category. Each band represents the degree of translation memory match expressed as a percentage (100%, 99% - 75% and 74% - 0%).		
Repetitions	The number of repeated words in the task.		

Translation History Report

Shows the status of the source and target text in each segment at every workflow step. The report also shows who worked on the segment in the step.

When you select **Management Reports** from the navigation tree and click on the **Translation History** link in the **Reports** screen, the **Reports/Translation History** screen is displayed.

Description of the Translation History report:

Field	Description			
Organization	The orga	The organization for which the report was run.		
Job	The task	The task for which the report was run, belongs to this job.		
Task	Task for which the report was run.			
Segment	Report data is displayed for each segment in the task.			
Score	If a translation memory match was applied to the segment, this is the amount of the match. For example, 85%.			
Original Segment Version	This is the original segment text.			
Latest Segment Version	This is the current version of the translation.			
Segment History	The following information is displayed for each segment version. A version is created every time the segment is saved:			
		Creation Date - Date that this version of the segment was created.		
		User - The user who performed the step in progress at the time.		
		Workflow Step - The name of the workflow step that was in progress when the segment version was created.		
		Text - The translation that existed in this version of the segment.		

Translation Memory Savings Report

This report shows the translation memory leverage and savings per target language for a selected organization. The data is based on jobs which have been authorized. This report is produced using invoice data. Invoice data is a permanent record in the database, of the costing information produced for the job by the **Cost Calculation** and **Complete Invoice** workflow steps.



You must include the **Cost Calculation** and **Complete Invoice** steps in any job for which you want to create this report.

When you select **Management Reports** from the navigation tree and click on the **Translation Memory Savings** link in the **Reports** screen, the **Reports/Translation Memory Savings** screen is displayed.

Description of the Translation Memory Savings report:

Field	Description
Organization	The name of the organization for which the Translation Memory Savings report has been generated.
Start Date End Date	This is the date range specified when the report was run. Only jobs created on or between these dates are included in the report.
Language	The translation memory savings figures on this row of the report, are for this language pair.
Task Count	The number of tasks for the language pair.
Total Words	The total number of words in the tasks.
PerfectMatch Words	The number of words in a segment translated using PerfectMatch.
Hundred Words	The number of 100% translation memory matches in the tasks.
Fuzzy Words	The number of fuzzy translation memory matches in the tasks.
New Words	The number of new words (words that have yet to be translated) in the tasks.
Repetitions	The number of repeated words in the tasks.
Total TM Cost	The total cost of using the translation memory.
% Total Cost	The percentage of the overall cost which can be attributed to the translation memory.

% TM Leverage	The percentage of words that already exist in the translation memory.
TM Leverage	The percentage of words in the tasks that already exist in the translation memory.
Average Cost Per Word	The cost per word of using the translation memory.

Translation Summary by Language Report

This report shows summary translation statistics for each target language that the selected organization supports. This report is produced using invoice data. Invoice data is a permanent record in the database of the costing information for a job that is created by including the **Cost Calculation** and **Complete Invoice** steps in the workflow for the job.



Report data will only be available for tasks which have completed the Cost Calculation and Complete Invoice steps.

□ The report includes invoice data from archived jobs.

When you select **Management Reports** from the navigation tree and click on the **Translation Summary by Language** link in the **Reports** screen, the **Reports/Translation Summary by Language** screen is displayed.

Description of the Translation Summary by Language report:

Field	Description
Organization	The name of the organization for which the Translation Summary by Language report has been generated.
Start Date End Date	Date range specified when the report was run. The data in this report is taken from jobs that were created on or between these dates.
End Date	The date you specified for the report to finish collecting information about the translation summary statistics for each target language.
Language	The data on this row of the report is for this language pair.
Total Files	The number of files sent for translation for this language pair.
Total Words	The total number of words in the files.
PerfectMatch	The number of words (in the tasks for this language pair) that were translated by PerfectMatch.
100% Match	The number of words (in the tasks for this language pair) that were translated with a 100% translation memory match.
Repetitions	Number of words (in the tasks for this language pair) that were repetitions of already counted words.

Fuzzy Words	The number of words (in the tasks for this language pair) that were translated with a translation memory match between 99% and 75%.
New Words	The number of words (in the tasks for this language pair) for which no translation memory match was found.
Total Cost	Cost of translating all tasks for this language pair.

User Work History Report

This report shows which users were responsible for a given workflow step within the specified date range. Although this report does not reflect costs, it is produced using information from invoice data which is stored permanently in the database. Invoice data is created by including the **Cost Calculation** and **Complete Invoice** steps in the workflows of jobs, and for this reason, you must include these workflow steps in any jobs for which you want user work history to be displayed.



NOTE

You must have selected the Create Permanent Task History check box in the System/Settings page to be able to run this report.

When you select **Management Reports** from the navigation tree and click on the **User Work History** link in the **Reports** screen, the **Reports/User Work History** screen is displayed.

Description of the User Work History report:

Field	Description
Organization	The name of the organization for which the report was run.
Start Date End Date	The date range specified when the report was run. Workflow steps that occurred on or between these dates are included in the report.
User	The data on this row of the report relates to this user.
Language Pair	A source and target language in respect of which the user has been allocated some tasks.
Task Count	The number of tasks allocated to the user for this language pair.
Total Words	The total number of words in the tasks.
Repetitions	The number of repeated words in the tasks.

Banding Word	Shows the translation memory match figures for the tasks on this row of
Counts	the report.
	Each band represents the degree of translation memory match
	expressed as a percentage (PerfectMatch, 100%, 99-75%, 74%-0%).

Vendor Summary Report

This report lists all vendors for the selected organization. For each vendor the report shows the vendor's contact details. This includes vendors defined in other organizations higher up the tree.

When you select **Management Reports** from the navigation tree and click on the **Vendor Summary** link in the **Reports** screen, the **Reports/Vendor Summary** screen is displayed.

Description of the Vendor Summary report:

Field	Description
Organization	The name of the organization for which the Vendor Summary report was generated.
Name	The name of a vendor that belongs to this organization.
Description	Vendor description.
Project Manager	The vendor project manager.
Key Contact	The name of the main contact at the vendor.
Key Contact Email address	Contact email address.
Address	The vendor's address.
Telephone no.	The vendor's telephone number.
Fax	The vendor's fax number.

TRANSLATION MEMORY REPORTS

The reports in the **Translation Memory Reports** category contain details on translation segments and translation memory size in SDL TMS.

TM Segments Created Report

This report shows the translation memory segments created within the specified date range.

When you select **Translation Memory Reports** from the navigation tree and click on the **TM Segments Created** link in the **Reports** screen, the **Reports/TM Segments Created** screen is displayed. Description of the **TM Segments Created** report:

Field	Description
Organization	Organization for which the report was run.
Start Date End Date	The date range specified when the report was run. Segments created on or between these dates are included in the report.
ТМ	The name of the translation memory for which this report was run.
Source Language	Segment source language.
Target Language	Segment target language.
Segments	The number of segments created for that language in the specified translation memory.

TM Segments Created and Used Report

This report shows the translation memory segments created and used within the specified date range.

When you select **Translation Memory Reports** from the navigation tree and click on the **TM Segments Created and Used** link in the **Reports** screen, the **Reports/TM Segments Created and Used** screen is displayed.

Description of the TM Segments Created and Used report:

Field	Description
Organization	Organization for which the report was run.
Start Date End Date	The date range specified when the report was run. Translation memory segments created and used on or between these days are included in the report.
ТМ	The name of the translation memory for which the TM Segments Created and Used report has been generated.
Source Language	Target language of the segments on this row of the report.
Target Language	A text description of the language.
Segments	The number of segments that were both created and used, for this language pair in the specified period.

Translation Memory Size Report

This report shows the number of segments for each source/target language pair in the selected translation memory

When you select **Translation Memory Reports** from the navigation tree and click on the **Translation Memory Size** link in the **Reports** screen, the **Reports/Translation Memory Size** screen is displayed.

Description of the Translation Memory Size report:

Field	Description
Organization	Organization for which the report was run.
ТМ	The name of the translation memory for which the report was run.
Source Language	Source language of the segments on this row of the report.
Target language	Target language of the segments on this row of the report.
Segments	The number of segments in the translation memory for this language pair.

VENDOR REPORTS

The vendor reports are only available to vendor users. They are vendor-specific versions of the standard reports:

Vendor Invoice

This report displays invoice data for all of the tasks in a job that have been assigned to the vendor and which are now complete.

A completed task is one in which all work has been finished and the translated file has been downloaded for distribution to the client.

Vendor Job Status

This report shows the status of all tasks in the selected job that are currently with the vendor for action. Tasks that have been completed do not appear in the report.

Word Count

This report displays the word counts for each task (in a job) currently assigned to the vendor.

These word counts are calculated during task per-processing.



11 Vendor Reports

ACKNOWLEDGMENTS

This appendix contains the list of open source or free third party libraries used in SDL TMS.

Appendix



Α

ACKNOWLEDGMENTS

SDL TMS uses a number of free third- party libraries, as follows:

□ AlphaFS:

AlphaFS is an Open Source library that provides a namespace (Alphaleonis.Win32.Filesystem) containing a number of classes. Most notable are replications of the System.IO.File, System.IO.Directory and System.IO.Path, all with support for the extended-length paths (up to 32000 chars), recursive file enumerations, native backups and manipulations with advanced flags and options. They also contain extensions to these, and there are many more features for several functions.

AngularJS:

AngularJS is a toolset for building the framework most suited to your application development. It is fully extensible and works well with other libraries. Features can be modified or replaced to suit your unique development workflow and feature needs.

ANTLR

ANTLR is a powerful parser generator that you can use to read, process, execute, or translate structured text or binary files.

□ Ascender

The font library available at Font Squirrel is your best resource for FREE, hand-picked, high-quality, commercial-use fonts.

AutoMapper:

AutoMapper is a A convention-based object-object mapper in .NET.

CAPICOM 2.1.0.2

CAPICOM can be used to digitally sign data, sign code, verify digital signatures, envelop data for privacy, hash data, encrypt/decrypt data and more.

Common Service Locator

The Common Service Locator library contains a shared interface for service location which application and framework developers can reference. The library provides an abstraction over IoC containers and service locators. Using the library allows an application to indirectly access the capabilities without relying on hard references. The hope is that using this library, third-party applications and frameworks can begin to leverage IoC/Service Location without tying themselves down to a specific implementation.

Dapper

A high performance Micro-ORM supporting SQL Server, MySQL, Sqlite, SqlCE, Firebird etc.

Entity Framework

Entity Framework is Microsoft's recommended data access technology for new applications.

Flexcel

100% managed code Excel file manipulation engine & Excel & PDF report generation for .NET & .NET Compact Framework.

Fluent Assertions

A very extensive set of extension methods that allow you to more naturally specify the expected outcome of a TDD or BDD-style unit test.

□ Glimpse

Glimpse is a web debugging and diagnostics tool used to gain a better understanding of what is happening inside of your ASP.NET 4.0 application.

□ Glimpse ASP.NET

Glimpse is a web debugging and diagnostics tool used to gain a better understanding of what is happening inside of your ASP.NET 4.0 application.

Glimpse Mvc4

Glimpse is a web debugging and diagnostics tool used to gain a better understanding of what is happening inside of your ASP.NET MVC 4.0 application.

globalize.TypeScript.DefinitelyTyped

JavaScript globalization and localization. Formats and parses strings, dates and numbers in over 350 cultures.

□ gudusoft.sqlparser.dll

Provides the class gudusoft.gsqlparser.TGSqlParserr necessary to create a SQL Parser and the classes a SQL Parser uses internally to handle different SQL dialects.

ICSharpCode Zip Lib

#ziplib (SharpZipLib, formerly NZipLib) is a Zip, GZip, Tar and BZip2 library written entirely in C# for the .NET platform. It is implemented as an assembly (installable in the GAC), and thus can easily be incorporated into other projects (in any .NET language).

□ Jasmine.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for jasmine.

□ Jasmine-js:

Jasmine is a behavior-driven development framework for testing JavaScript code. The package contains only jasmine.js which is useful for using together with Chutzpah.

□ Jasmine.Test

TDOM-less simple JavaScript testing framework.

jQuery:

jQuery is a fast, small, and feature-rich JavaScript library. It makes things like HTML document traversal and manipulation, event handling, animation, and Ajax much simpler with an easy-to-use API that works across a multitude of browsers. With a combination of versatility and extensibility, jQuery has changed the way that millions of people write JavaScript.

jquery.datatables

DataTables is a plug-in for the jQuery Javascript library. It is a highly flexible tool, based upon the foundations of progressive enhancement, which will add advanced interaction controls to any HTML table.

jquery.dataTables.columnFilter

Adds advanced filter capabilities to the DataTables. JS file.

jquery.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for jquery.

jQuery.UI.Combined

jQuery UI is an open source library of interface components - interactions, full-featured widgets, and animation effects - based on the stellar jQuery javascript library . Each component is built according to jQuery's event-driven architecture (find something, manipulate it) and is themeable, making it easy for developers of any skill level to integrate and extend into their own code.

jQuery Validation

This jQuery plugin makes simple clientside form validation trivial, while offering lots of option for customization. That makes a good choice if you're building something new from scratch, but also when you're trying to integrate it into an existing application with lots of existing markup. The plugin comes bundled with a useful set of validation methods, including URL and email validation, while providing an API to write your own methods.

□ jsTree:

jsTree is jquery plug-in, that provides interactive trees. It is absolutely free, open source and distributed under the MIT license. jsTree is easily extendable, themable and configurable, it supports HTML & JSON data sources and AJAX loading.

C Knockout JavaScript library:

Knockout is a JavaScript library that helps you to create rich, responsive display and editor user interfaces with a clean underlying data model. Any time you have sections of UI that update dynamically (e.g., changing depending on the user's actions or when an external data source changes), KO can help you implement it more simply.

knockout.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for knockout.

knockout.validation.typeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for knockout.validation.

knockoutjs

A JavaScript MVVM library to help you create rich, dynamic user interfaces with clean maintainable code.

□ KnockoutJS.Validation

A validation plugin for KnockoutJS.

Korzh

Ad-hoc query builder is a useful addition to WebForms and the MVC web-app that requires some functionality for advanced searching and/or filtering.

🖪 linq.js

Linq to Objects for JavaScript.

linq.js-jQuery

Linq to Objects for JavaScript. This version is plugin integrated with jQuery.

Iinq.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for linq. Generated based off the DefinitelyTyped repository [git commit: 44592d79b86a2b940212511775d92b437e54ceea]. http://github.com/DefinitelyTyped.

Microsoft ASP.NET MVC

This package contains the runtime assemblies for ASP.NET MVC. ASP.NET MVC gives you a powerful, patterns-based way to build dynamic websites that enables a clean separation of concerns and that gives you full control over markup.

Microsoft ASP.NET Razor

This package contains the runtime assemblies for ASP.NET Web Pages. ASP.NET Web Pages and the new Razor syntax provide a fast, terse, clean and lightweight way to combine server code with HTML to create dynamic web content.

Microsoft ASP.NET Web Optimization

ASP.NET Optimization introduces a way to bundle and optimize CSS and JavaScript files.

Microsoft ASP.NET Web API 2.2:

This package contains everything you need to host ASP.NET Web API on IIS. ASP.NET Web API is a framework that makes it easy to build HTTP services that reach a broad range of clients, including browsers and mobile devices. ASP.NET Web API is an ideal platform for building RESTful applications on the .NET Framework. SDL uses the Web API client libraries, core libraries, the API for OData 4.0, and the Web host.

Microsoft ASP.NET Web Pages

This package contains core runtime assemblies shared between ASP.NET MVC and ASP.NET Web Pages.

Microsoft ASP.NET Web Pages Data

This package contains the runtime assemblies for ASP.NET Web Pages. ASP.NET Web Pages and the new Razor syntax provide a fast, terse, clean and lightweight way to combine server code with HTML to create dynamic web content.

Microsoft BCL Build Components

This package provides build infrastructure components so that projects referencing specific Microsoft packages can successfully build. Do not directly reference this package unless you receive a build warning that instructs you to add a reference.

Microsoft BCL Portability Pack

This packages enables projects targeting down-level platforms to use some of the types added in later versions.

Microsoft Data UnitTesting

Part of Visual Studio, the Microsoft.VisualStudio.TestTools.UnitTesting namespace supplies classes that provide unit testing support.

Microsoft Enterprise Library

Microsoft Enterprise Library is a collection of application blocks designed to assist developers with common enterprise development challenges. Application blocks are a type of guidance, provided as source code that can be used "as is," extended, or modified by developers for use in their development projects.

Microsoft jQuery Unobtrusive Ajax

jQuery plugin that unobtrusively sets up jQuery Ajax.

Microsoft jQuery Unobtrusive Validation

jQuery plugin that unobtrusively sets up jQuery.Validation.

Microsoft HTTP Client Libraries

This package includes HttpClient for sending requests over HTTP, as well as HttpRequestMessage and HttpResponseMessage for processing HTTP messages. This package is not supported in Visual Studio 2010, and is only required for projects targeting .NET Framework 4.5, Windows 8, or Windows Phone 8.1 when consuming a library that uses this package.

Microsoft Web Administration

The Microsoft.Web.Administration namespace contains classes that a developer can use to administer IIS Manager. With the classes in this namespace, an administrator can read and write configuration information to ApplicationHost.config, Web.config, and Administration.config files. For more details, see:

http://blogs.msdn.com/b/carlosag/archive/2006/04/17/microsoftwebadministration.aspx.

Microsoft Web Infrastructure

This package contains the Microsoft.Web.Infrastructure assembly that lets you dynamically register HTTP modules at run time.

Modernizr

Modernizr is a JavaScript library that detects HTML5 and CSS3 features in the user's browser.

MOQ

Moq is the most popular and friendly mocking framework for .NET.

Mvc.JQuery.Datatables



Strongly type html helpers for rendering jquery.datatables tables from IQueryables.

Newtonsoft.Json

Json.NET is a popular high-performance JSON framework for .NET.

🖪 Q

A library for making and composing asynchronous promises in JavaScript.

Q.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for q. Generated based off the DefinitelyTyped repository [git commit: 13308a020d67ad90337790d51f635747e307161c]. http://github.com/DefinitelyTyped.

RequireJS

RequireJS is a JavaScript file and module loader. It is optimized for in-browser use, but it can be used in other JavaScript environments.

ScriptUtils(ASPForm x64)

This installation package contains ScriptUtilities libraries.

Stimulsoft

This all-in-one solution is a comprehensive platform that includes a complete set of tools to build reports under JavaScript, ASP.NET, ASP.NET MVC, WPF, Silverlight, WinRT, HTML5, Windows Forms, PHP, Java, and Flex.

T4 Toolbox

T4 Toolbox extends the code generation functionality of the T4 text templates in Visual Studio 2015.

Telerik

Telerik UI for ASP.NET MVC is a suite of products containing Kendo UI Professional and server wrappers for Microsoft's ASP.NET MVC framework.

Text Plug-in for RequireJS

A RequireJS/AMD loader plug-in for loading text resources.

requirejs.TypeScript.DefinitelyTyped

TypeScript Definitions (d.ts) for requirejs.

StructureMap

StructureMap is a Dependency Injection / Inversion of Control tool for .Net that can be used to improve the architectural qualities of an object oriented system by reducing the mechanical costs of good design techniques.

□ Structuremap.automocking

Test utility to instantiate a class by creating mocks for each of its dependencies.

WebGrease

Web Grease is a suite of tools for optimizing javascript, css files and images.

🖪 WIX

The WiX toolset builds Windows installation packages from XML source code. The tool-set integrates seamlessly into build processes.

I XMLDiffPatch

Generates difference files based on the comparison of two XML documents. This code is based on a very old .NET 1.0 example project.

SDL*

SDL (LSE:SDL) is the global innovator in language translation technology, services and content management. With more than 20 years of experience, SDL delivers transformative business results by enabling powerfully nuanced digital experiences with customers around the world.

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