User Guide for Project Managers

September 2018

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Version	Author	Description of Version	Date
0.1	Marion Mordenti	First version	14-JUN-2009
0.2	Marion Mordenti	SP3 - Patch 3 changes	10-NOV-2009
1.0	Marion Mordenti	Server migration to ETMA@HP	25-JAN-2010
1.1	Marion Mordenti	New reports deployed on ETMA	6-MAY-2010
2.0	Marion Mordenti	Server upgrade to TMS 2011	6-MAR-2012
2.1	Laura Flores	SDL TMS 2011 (revised)	26-SEPT-2014
3.0	Laura Flores	SDL TMS 11.2.1	26-SEPT-2018

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Accessing ETMA (SDL TMS)

In order to access ETMA you need:

1. Microsoft Internet Explorer 11, Microsoft Edge version 25, Mozilla FireFox ESR45, Google Chrome Version 54.

2. A valid ETMA user login name and password.

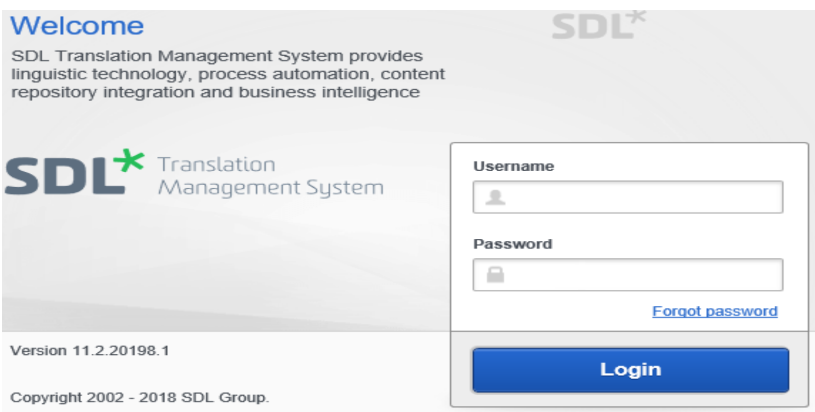
Logging In and Out

Turn off all pop-up blockers (Disable pop-up blockers or allow pop-ups from the SDL TMS system)

Non-HP Employees (external): Requires a BPIA certificate to be installed on their PC. These certificates are available from the external agency you are working for (from the designated BPIA approver) **HP (internal) employees:** Require an HP digital certificate to be installed on PC (class A or B).

1. Enter the SDL ETMA URL (http://www.hp.com/go/etma) to display the login screen.

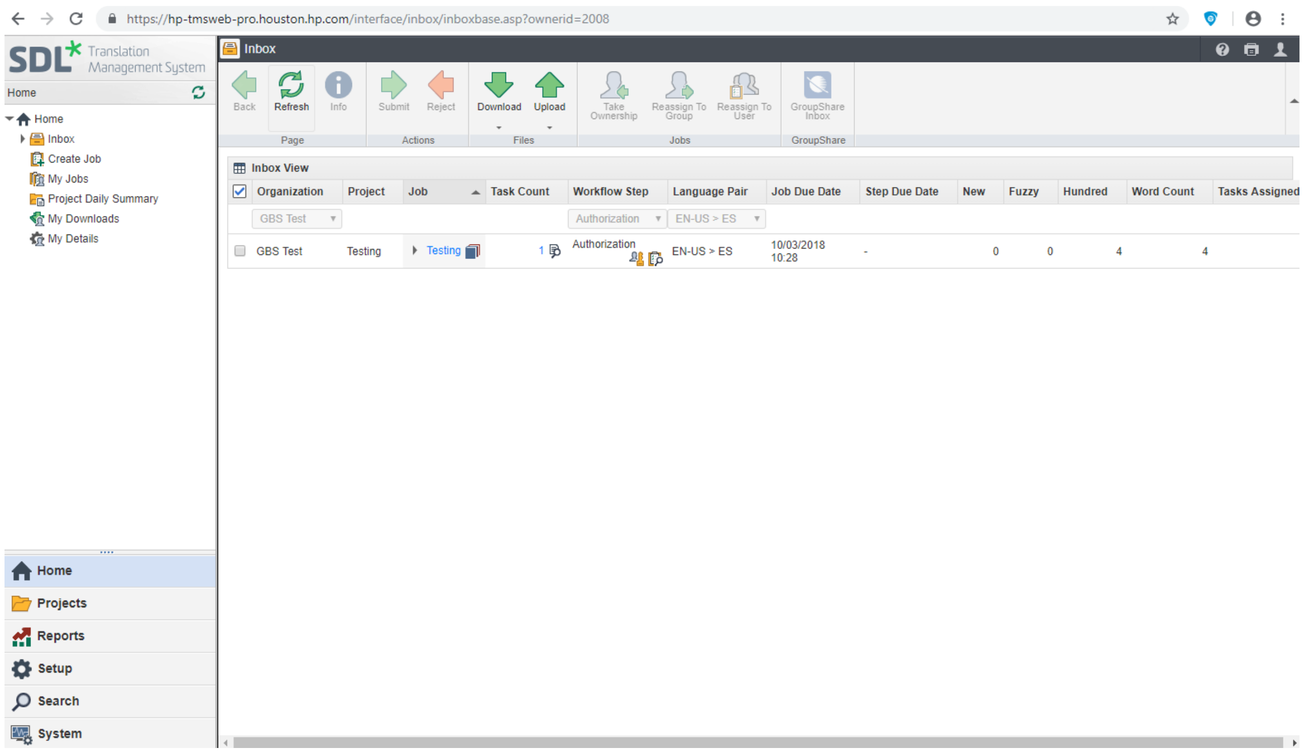
2. Enter your username and password and click the Log In button



Overview

Project Managers create localization jobs. They are also often responsible for authorizing a job before the job is sent for translation. This authorization step allows them to check the job word count, the content which has been extracted for translation, as well as the workflow and users assigned to each human workflow stages.

Project Managers manage the day-to-day life cycle of each job, and may run reports on word count, job status and translation quality. The screenshot below shows the basic list of items available to Project Managers when they log into ETMA.



*If the **Create Job** menu is not display on your Homepage, go to the **Setup** menu (menu button down on the left hand side), select another organization from the drop-down menu, and reselect the correct organization. Switch page to your **Home** page, the Create Job option should now appear.*

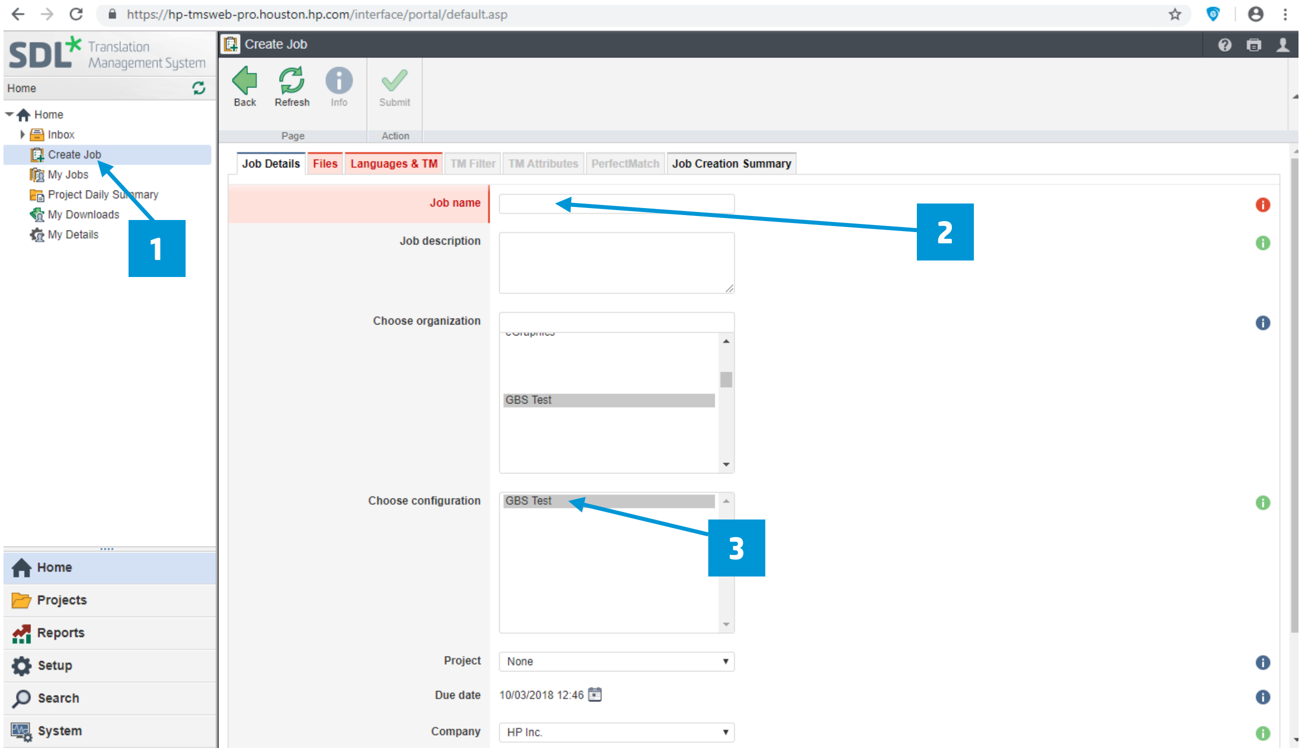
Job Creation

Project Manager can create localization jobs. These users may also be responsible for authorizing jobs prior to being sent to the translator or reviewer.

Create job

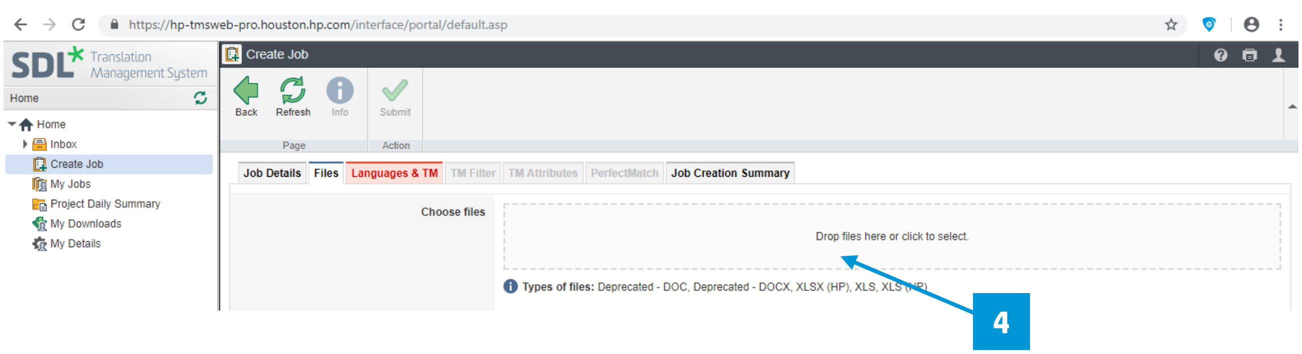
Locate the files to be included in the job. If there are several files, place them in a single zip file to make file selection easier. Remember that all files in a job must be in the same language.

1. Click the **Create Job** option.
2. Enter the name of your job (the name should be unique and meaningful)
3. Select a configuration (if more than one is available)

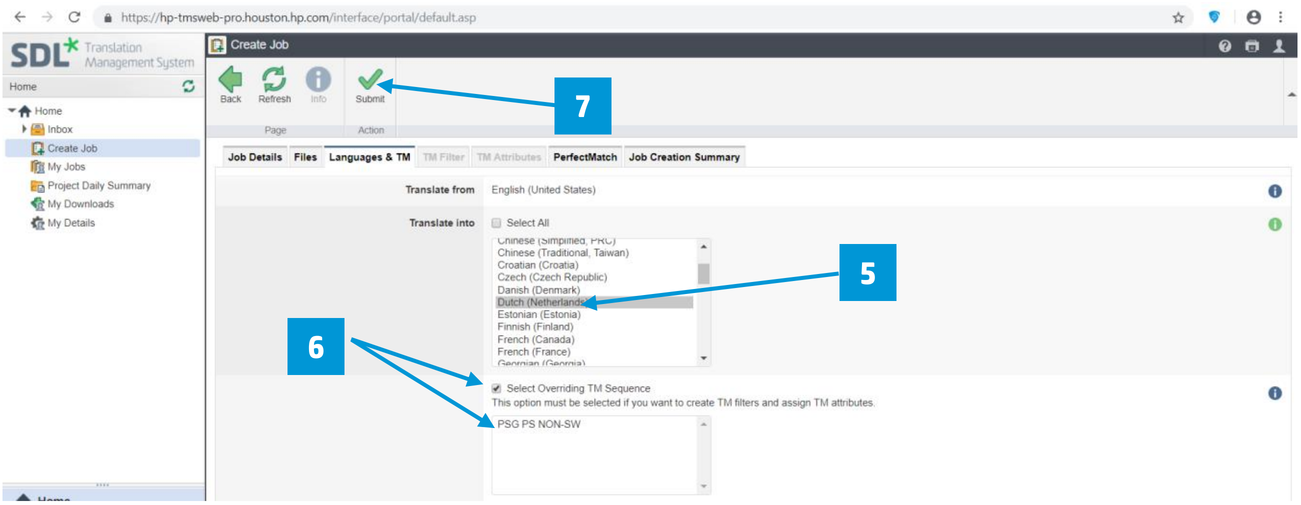


Field displayed in "red" are mandatory fields, they will turn black as soon as you provide this information. The [ ] icon on the right of each field provides some information on this specific field.

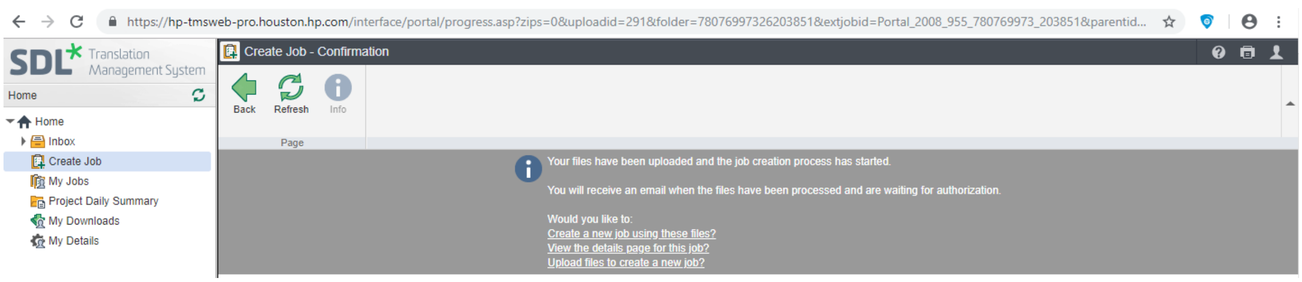
4. At **Choose files** part, drop or click to select the files to upload (Remember that all files in a job must be in the same language. You may also upload a .zip file).



5. Select your target language(s) from the list of languages available for your configuration.
6. If more than one TM sequence is available in the selected configuration, please ensure to click the **Select Overriding TM sequence** checkbox and select the correct TM Sequence from the available list.
7. When all information is entered in required fields, click the **Submit** button

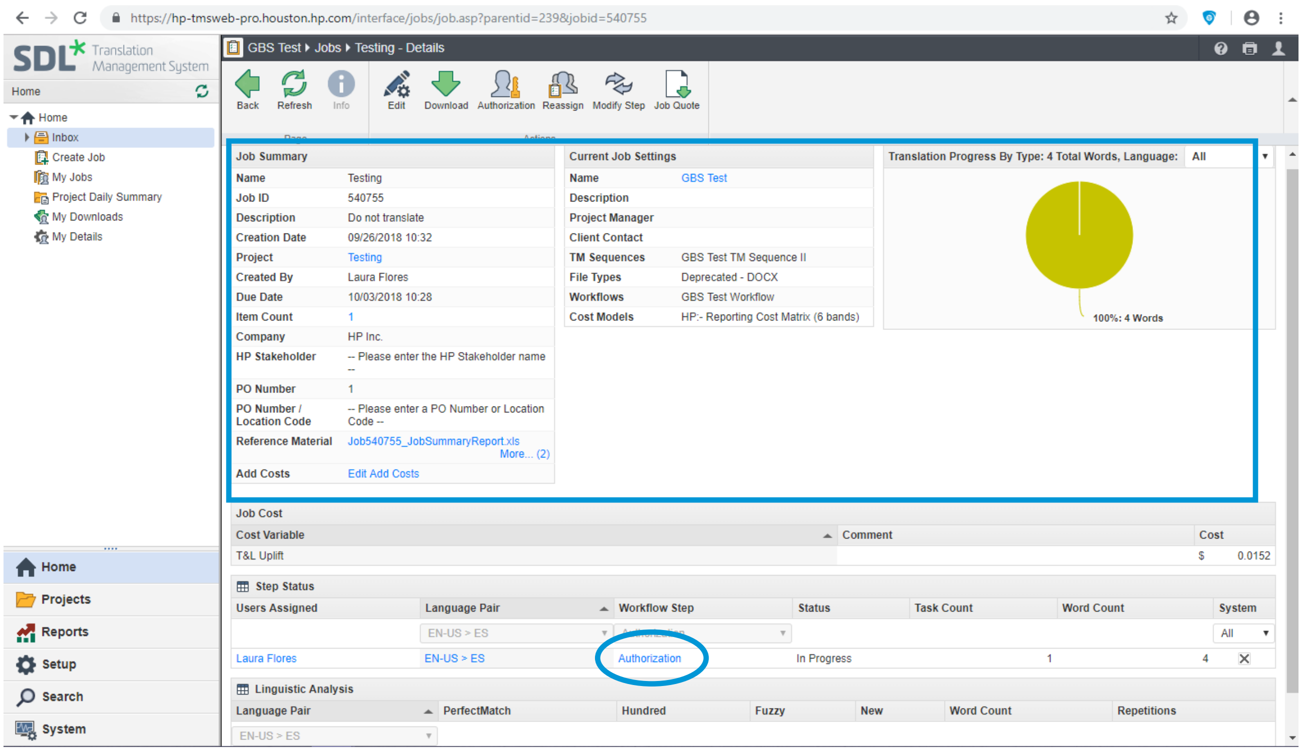


When the files have been uploaded and the job creation process has started this message appears:



NOTE: You can create a new job with the same files already uploaded by choosing the ***Create a new job using these files*** *link or upload new files to create a job with the same settings by choosing* ***Upload files to create a new job****.*

If you choose to select the **View the details page for this job**, you will see the details of your job, eventually the system steps, and will then be able to authorize your job



You may also click **My jobs** menu (on the left navigation column) to see your job status summary and the job that are pending authorization.

Job Authorization

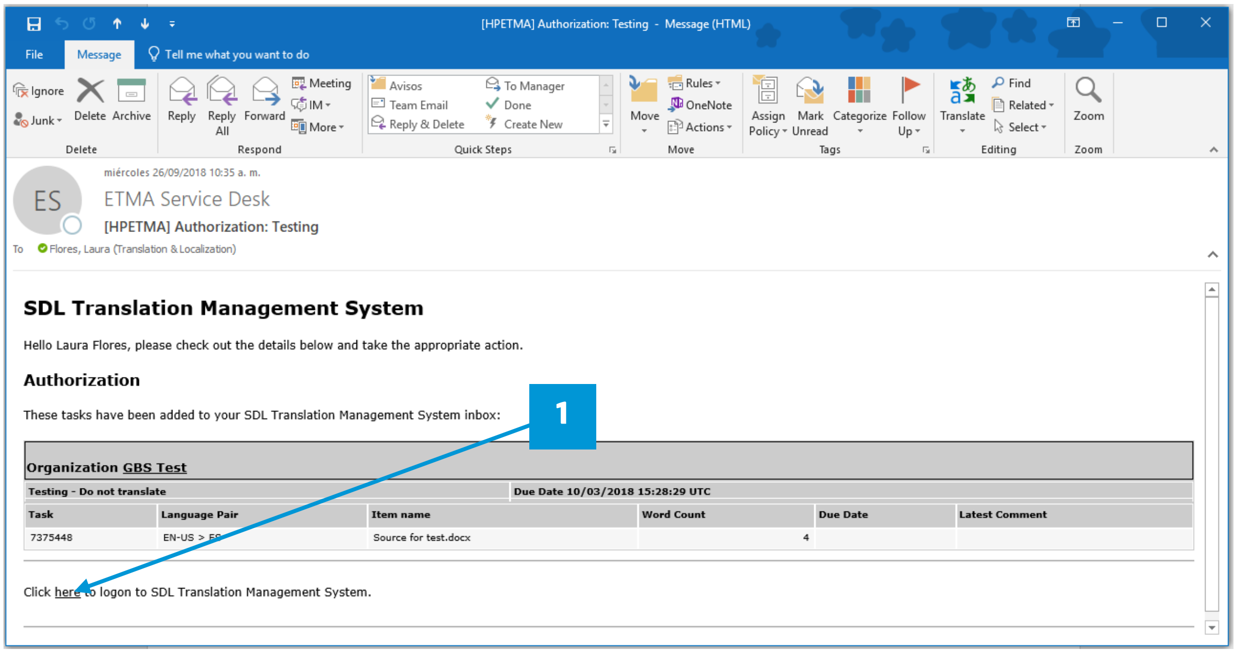
Authorization is a workflow stage in which, a user who has been given the role of Authorizer checks new translation requests (jobs) and decides whether the tasks they contain should be translated or not. A task is created for each target language version of each original language file submitted in the job and an authorize or terminate decision is required for each one. Authorized tasks proceed immediately to the next workflow stage. 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, cost matrix or priority level assigned to the task. Once a job has been authorized, invoice details are generated, and the Job Invoice report can be run.

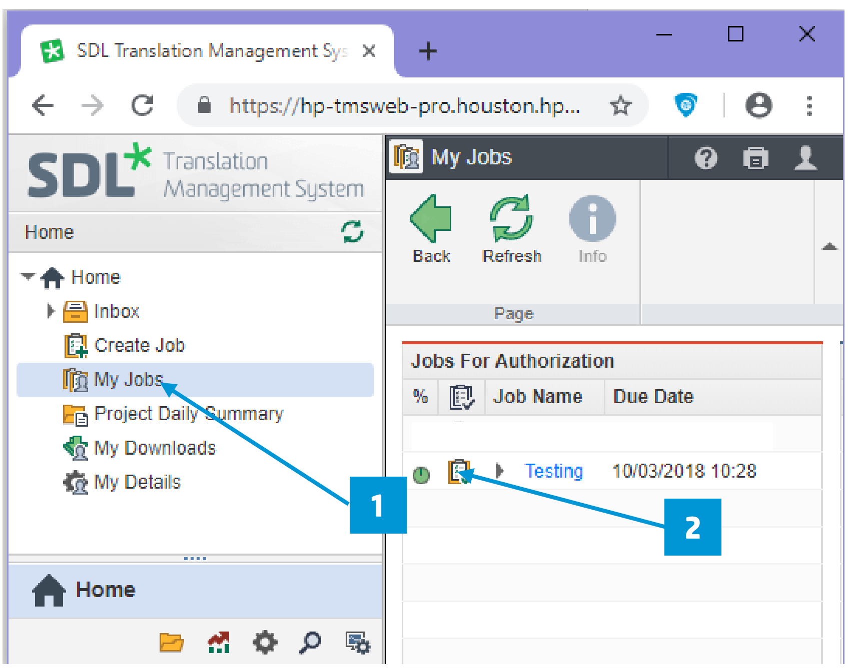
Soon after you create a job, you will receive the following email notification alerting you that a job needs to be authorized.

Click the link "here" at the bottom of the email message to log in to your account and authorize the job.



Authorize a job

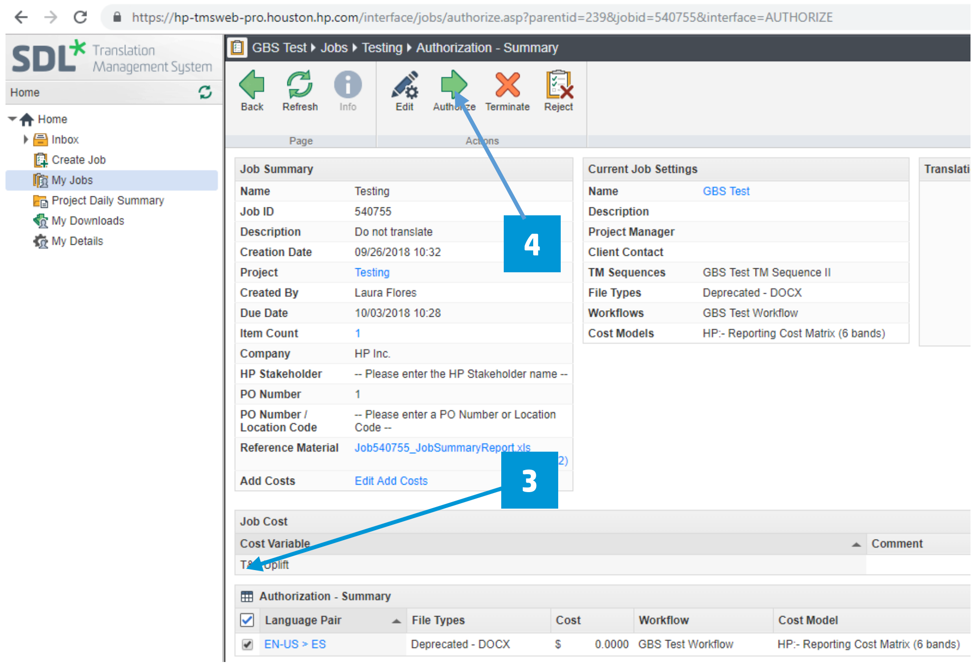
1. Click My jobs in the left navigation bar
2. Click the Authorization Summary icon [ ] in My jobs view page.



3. Check the job content and word count, and when ready to authorize, tick the check box for this task.

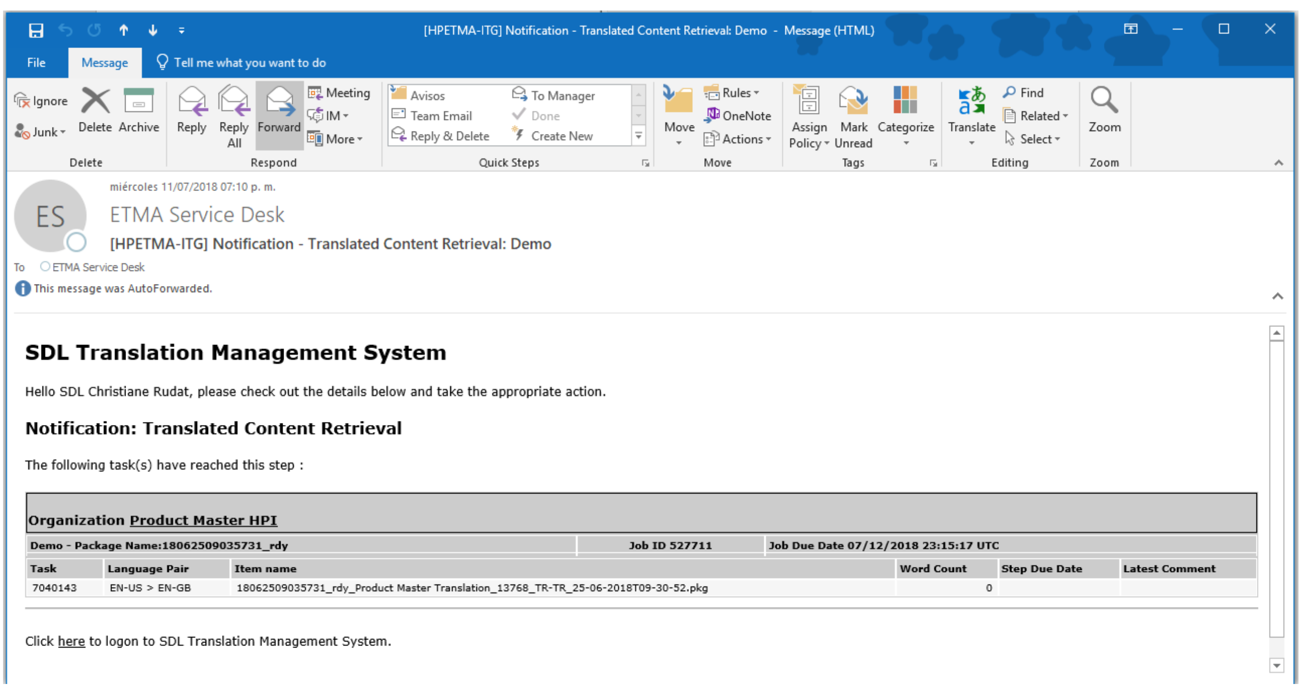
4. Click the Authorize button in the top menu.

<u>NOTE</u>: If you click the Terminate button, the job is deleted from the system.



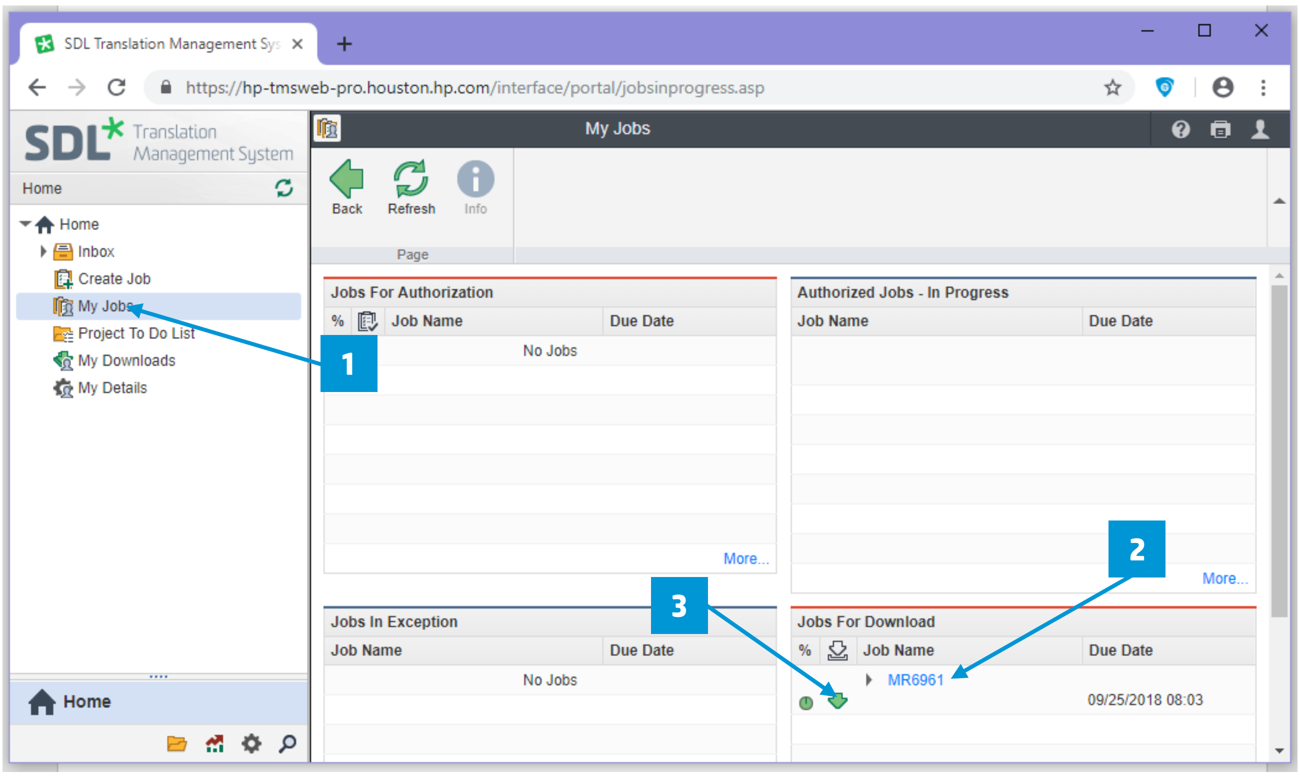
Translated Content Retrieval

Once a job is completed, you will receive the following email notification alerting you that a job is available for retrieval.

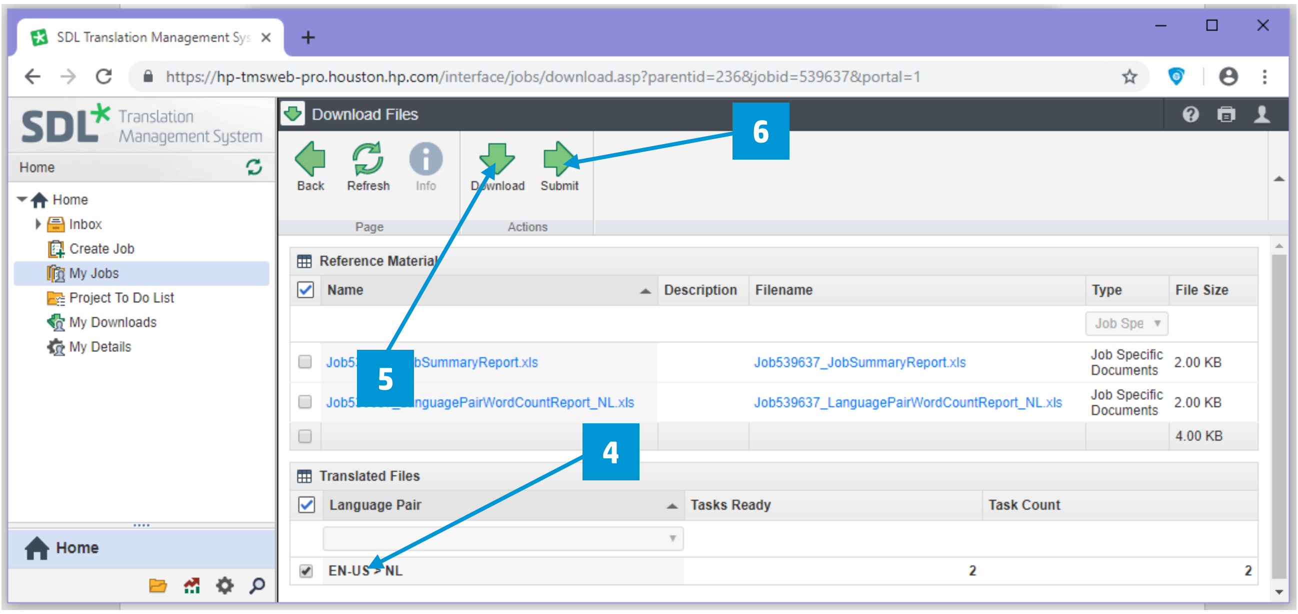


Retrieve translated content

1. Click on **My Jobs** in the left navigation bar.
2. Look for the job you need to download under **Job For Download** on **My Jobs** summary page.
3. Click on the [] icon next to the job name you wish to download



4. Tick the select box ( ) for the language pairs you want to download (you have the number of Tasks Ready for each language pair)
5. Click the Download button.



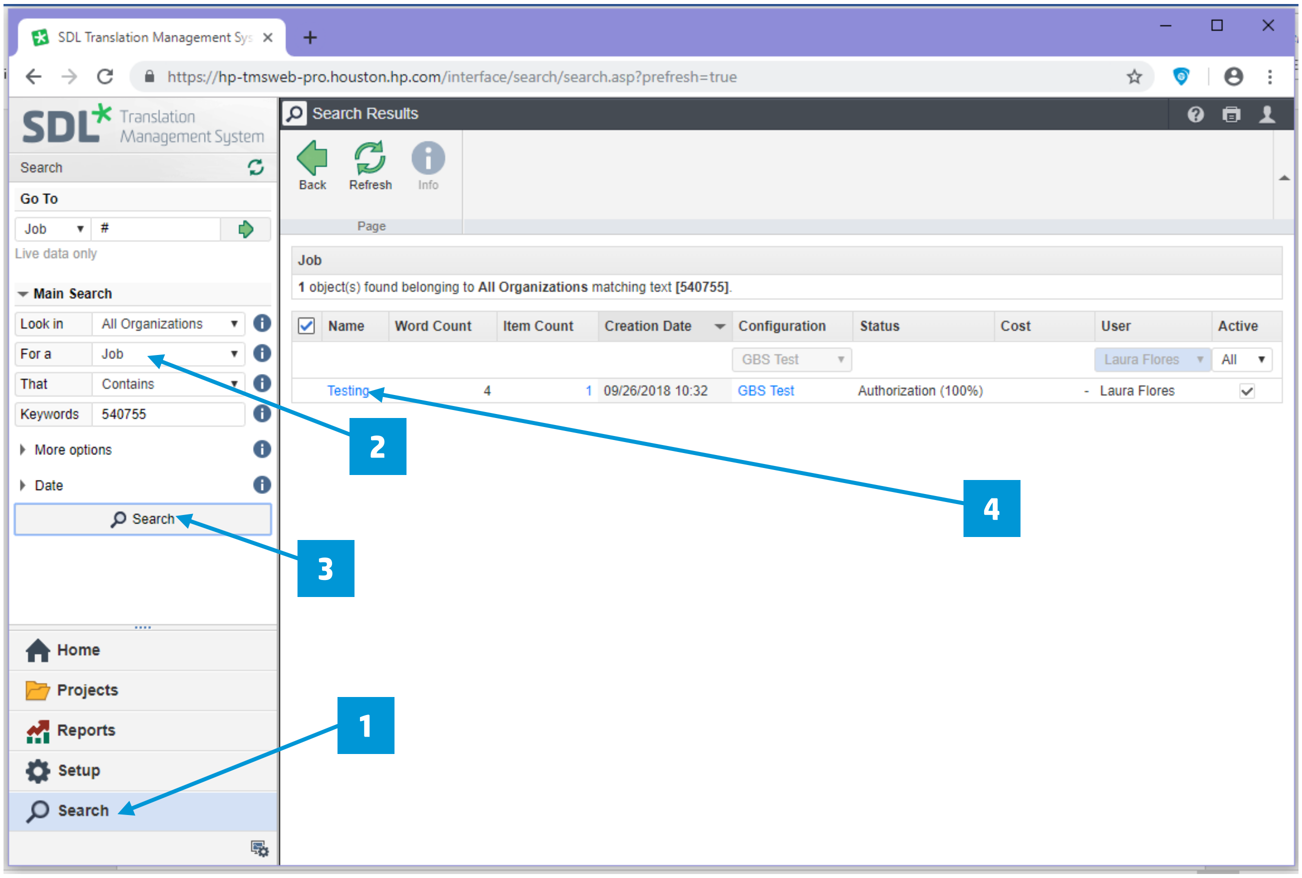
<u>Note</u>: You may at any time access the packages that you previously downloaded from **My Downloads** in the navigation bar.

Once you have downloaded ALL translated content for a job, click the **Submit** button, to move your job to the **Finished** stage in the workflow.

Your job will no longer be visible on your account under **My Jobs**, but will be retrievable from the **Project** tab or from the **Search** menu.

Retrieve a finished job

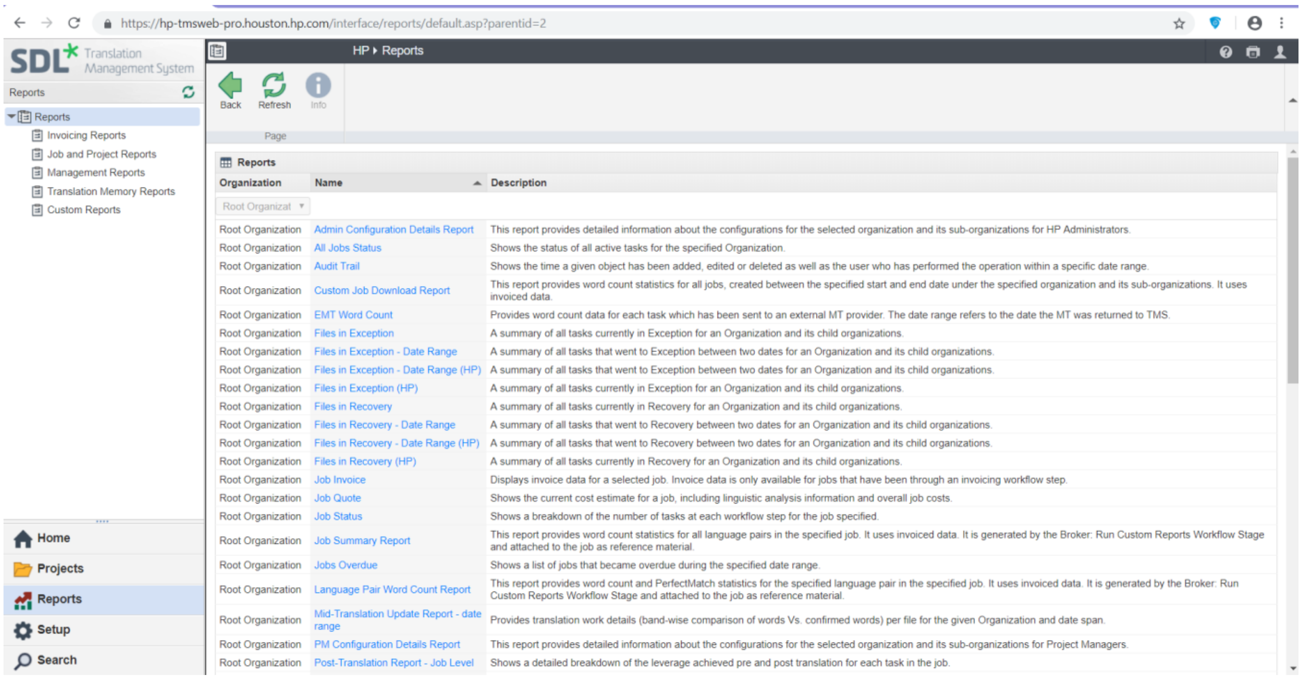
1. Click on the **Search** menu on the left navigation bar.
2. Enter your search information in the **Main Search** window at the top of the left navigation bar. You may search by Job, Task ID, etc…
3. Click on the **Search** button. The Found object(s) will be displayed on your main window.
4. Click on the job name in the **Name** column, to modify the workflow stage of a specific.



Jobs should stay in **Finished** stage as long as you need to have access to these jobs. When this is no longer needed and in order to improve display performance and use it as a Perfect match candidate click on the **Submit** button for a job in **Finished**, this will put it in **Complete** stage. All completed jobs are removed from the system after 45 days.

Reports

Custom reports. Reports are generated in HTML or Excel formats.



Reports are accessed via the Reports navigation button. Contact ETMA Service Desk, if you do not see the reports navigation button.

Job Creators can run several standard reports and have the ability to create and run

Report types

Invoicing Reports

Job invoice	Shows the Invoice information for a selected job. This report is produced using invoice data.
Job quote	Shows the current cost estimate for a job, including linguistic analysis information and overall job costs.
Project invoice	Shows the Invoice information for a selected project. This report is produced using invoice data.

Job and Project Reports

All Jobs Status	Shows the status of all active tasks for the specified Organization.
Job Status	Shows a breakdown of the number of tasks at each workflow stage for the job specified.
Job Overdue	Shows a list of jobs that became overdue during the specified date range.
QA Check Failed – Date Range	Shows QA checks that have failed for all jobs in a specific date range
QA Check Failed – Job	Shows QA checks that have failed for a specific job.

Management Reports

Production Cycle	Shows the time tasks have been at various human stages for jobs within a specific date range.
Task History	Shows the date and time that tasks started each human stage for a specific date range.
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.
Translation Summary by Language	Shows the translation summary statistics for each target language. This report is produced using invoice data.
User Work History	Shows which users were responsible for a given workflow stage within a specific date range.

Translation Memory Reports

Translation Memory Size	This report provides segment and word count information per language pair for Translation Memories under the specified organization and its sub-organizations.

Custom Reports

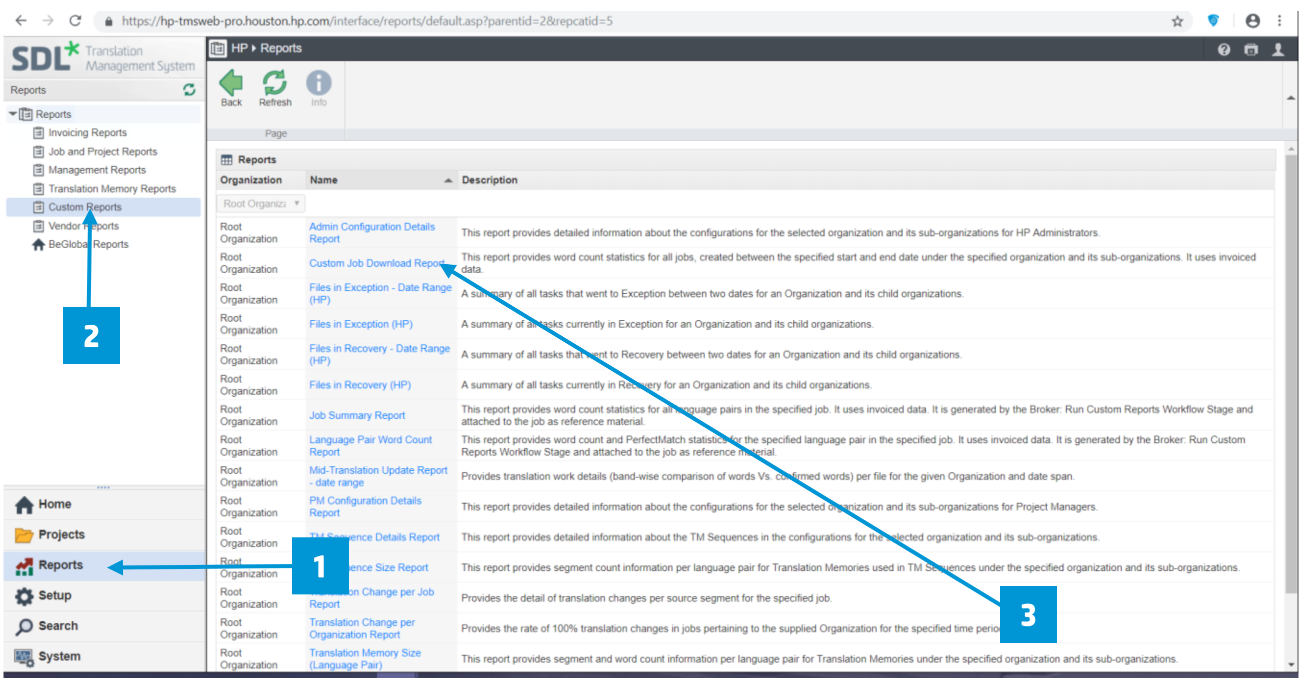
Admin Configuration Details	This report provides detailed information about the configurations for the selected organization and its sub-organizations for HP Administrators.
Custom Job Download	This report provides word count statistics for all jobs, created between the specified start and end date under the specified organization and its sub-organizations. It uses invoiced data. This is equivalent to the Download Report in GXT.
Job Summary Report	This report provides word count statistics for all language pairs in the specified job. It uses invoiced data. It is generated by the Broker: Run Custom Reports workflow stage and attached to the job as reference material. This is equivalent to the Project Word Count Report in GXT.
Language Pair Word Count Report	This report provides word count statistics for the specified language pair in the specified job. It is generated by the Broker: Run Custom Reports workflow stage and attached to the job as reference material.
PM Configuration Details Report	This report provides detailed information about the configurations for the selected organization and its sub-organizations for Project Managers.
TM Sequence Details Report	This report provides detailed information about the TM Sequences in the configurations for the selected organization and its sub-organizations.
TM Sequence Size Report	This report provides segment count information per language pair for Translation Memories used in TM Sequences under the specified organization and its sub-organizations.
Translation Memory Size (Language Pair)	This report provides segment and word count information per language pair for Translation Memories under the specified organization and its sub-organizations.
Workflow Details	This report provides detailed information about the workflows and workflow templates for the selected organization and its suborganizations.
Workflow Step Duration Report	Provides the detailed information about the workflow stages start and end time for all jobs under the selected organization and its suborganizations.

Vendor Reports

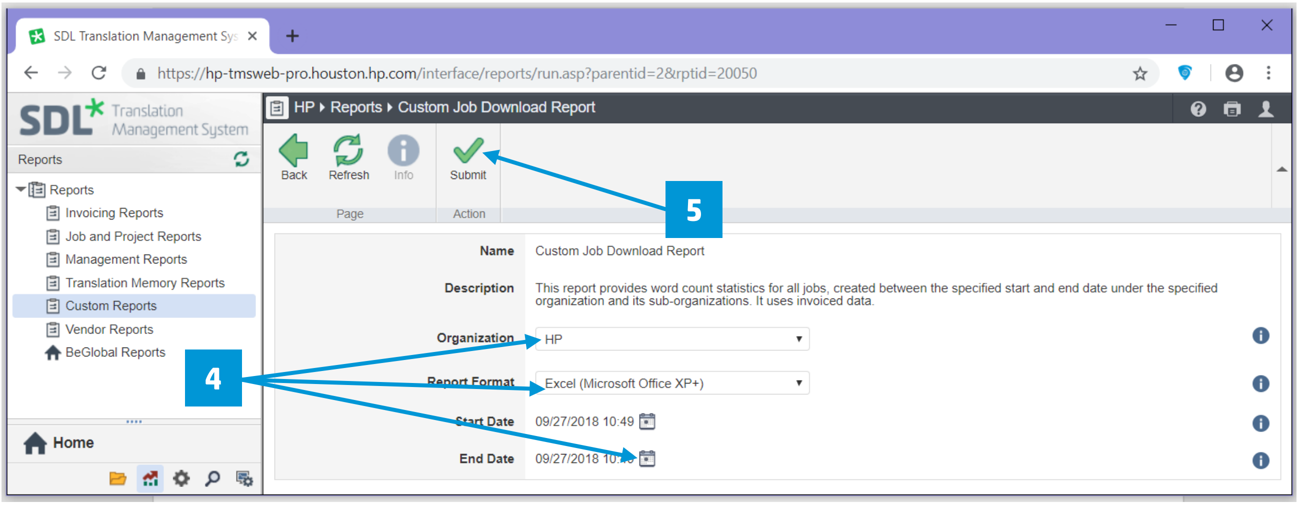
Vendor Invoice	Shows the Invoice information for a selected vendor. This report is produced using invoice data.
Vendor Job Status	Shows a breakdown of the number of tasks at each workflow stage for the vendor specified.

Run a report

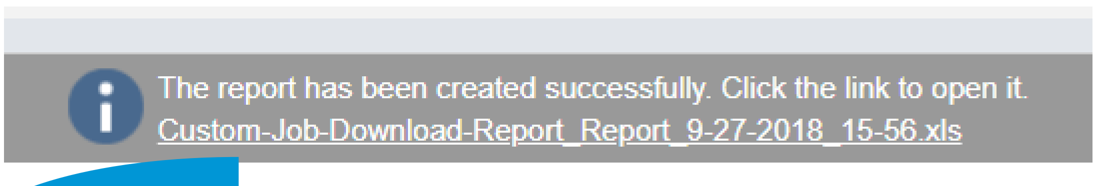
1. Click the **Reports** navigation button.
2. Click the type of report you want to access (from the left navigation tree).
3. In the Reports page, click the name of the report you wish to generate.



4. Select a report format: HTML (displays on web browser) or Excel (output the report to a spreadsheet file for download) … and complete all required field (if any).
5. Click the **Submit** button.



SDL TMS creates a link to download or open the report. Click the link to continue.



SDL Translation Management System

Custom Job Download Report

Generated : 09/27/2018 15:57

Organization:	Standard (Reference)
Start Date:	08/01/2018 15:55
End Date:	09/27/2018 15:55

Project Name	Project ID	Job ID	Job Name	Job Status	Organisation Name	Company	Vendor Name	PO Code	HP Stakeholder	Configuration	Job Creator	Project Manager	TM Sequence	Terminology Sequence	Language Pair	Workflow Step	Number of Tasks	Total Words	PerfectMatch	Repetitions
		533,696	Test job for Performance Testing – 08-02-2018	Active	Standard (Reference)	HP Inc.	Unused			Performance testing - manual submission	hp_testing	hp_testing	Performance Testing	HP Global Terminology	EN-US > JA	Broker: Run Custom Reports	1	22,778	0	349
		533,696	Test job for Performance Testing – 08-02-2018	Active	Standard (Reference)	HP Inc.	Unused			Performance testing - manual submission	hp_testing	hp_testing	Performance Testing	HP Global Terminology	EN-US > ZH-CN	Broker: Run Custom Reports	1	108,180	0	4,567
		533,696	Test job for Performance Testing – 08-02-2018	Active	Standard (Reference)	HP Inc.	Unused			Performance testing - manual submission	hp_testing	hp_testing	Performance Testing	HP Global Terminology	EN-US > ZH-CN	Recovery	1	22,778	0	501
		533,894	Test job for Performance Testing – 08-03-2018	Active	Standard (Reference)	HP Inc.	Unused			Performance testing - manual submission	hp_testing	hp_testing	Performance Testing	HP Global Terminology	EN-US > JA	Broker: Run Custom Reports	2	130,958	0	4,920