Better Translation Technology

XTM User Manual

For Administrators,

Project Managers,

Linguists & Customers

Documentation for XTM Version 11.4.

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Table of Contents

1. Introduction

This document is an XTM user manual for both the complete standalone version of XTM called XTM Suite and the software as a service version called XTM Cloud.

Users and roles in XTM

In XTM there are a number of predefined roles with unique functions. The administrator is the highest level of user.

The following table shows a list of the user roles and their functions:

User role	Function
Administrator	Create and edit other Administrators Create and edit Project Managers Configure XTM Review & renew subscription (XTM Cloud only) + all the roles below
Project Manager	Create and edit other Project Managers Create and edit Linguists Create Customers Manage Projects
PM – projects & customers	Customers - Can edit customer details and projects for specified customers only. Project creation - Can see General, Languages and Tags. Can have access rights to see LQA results. Project Editor – Can see • General, • Metrics, • Workflow (no linguist names), • Files, • Estimates proposals only.
PM – project creator & viewer	Can create projects Project Editor – Can read projects only for specified customers and can see • General, • Metrics, • Workflow (no linguist names), • Files (Can download files but cannot generate them) No access to customers or users Can have access rights to see LQA results.
Customer Project Manager	Customisable level of access to: Create and manage Projects Manage Translation Memory Manage Terminology
Terminologist	Access to XTM terminology with definable rights
TM Expert	Access to XTM TM Manager with definable rights
Linguist	Access to any of the 4 steps in the workflow

There are 4 default workflow steps:

Step	Function
Translate	Translate the source text or accept and edit the TM or MT matches
Correct	A corrector is allowed to edit the translations
Review	A reviewer is allowed to add comments only
LQA	A step dedicated to performing LQA

This manual has been organised in chapters that are relevant to the different user roles or steps. Since any user may have many roles, you may need to view more than one chapter in order to have a complete overview of your functionality. Also certain sections of the manual have been repeated to ensure that the description for different roles is as complete as possible.

PC set up

You will have either received an email from XTM Cloud or your server administrator should provide you with the web address to access XTM. All you need on your PC is a web browser and access to the internet. XTM is compatible with Firefox, Microsoft Internet Explorer, Safari and Google Chrome. We strongly recommend that you use the latest shipping version of these browsers to ensure the best performance and stability. It has been optimised to run on tablets as well as PCs.

Please make sure that pop-ups and JavaScript are enabled. Also note that certain browser plug-ins may affect your ability to log into the system or use some of the features. In particular the following: plug-ins are known to be incompatible.

- Browser Highlighter
- Fast Browser Search

The minimum technical requirements to access XTM Cloud from a PC are:

- Screen resolution width: Greater than 1000 pixels.
- Processor: Core 2 Duo processor
- RAM: 2Gb
- Bandwidth:1Mb/s, cable connection

XTM can be accessed on the following platforms and browsers:

Windows:
- Edge 12+
- Internet Explorer 11+
- Firefox 4+
- Chrome 24+

Mac OS:
- Safari 6+
- Firefox 4+
- Chrome 24+

Linux:
- Firefox 4+
- Chrome 24+

Mobile:
- Safari 6+for iPad
- Firefox for Android 23+

Computer activation for XTM Cloud

As a security measure, the first time you log on you will need to activate your PC before being able to access your account on XTM Cloud. To do this:

1. Go to the XTM Cloud login page
2. Enter your Company name, username and password.
3. You will then receive the message "This computer is not authorized ..." click the link "activate computer".
4. XTM Cloud will then send you an email with an activation link.
5. Open the email, copy the activation link and paste it into the address bar of your browser and press enter.

After this you should see a message that your browser has been successfully activated. Note:

- You will be asked to do this once on each new PC that you use to access XTM
- You can only use each link once.
- You need to generate an activation link for each new browser.
- You need to carry out all the actions above on the same PC
- This level of security can be changed by going to Configuration, Settings, Security.

File size limitations in XTM

In the following areas of the program the file size that you can upload at one time is limited in XTM Cloud to less than 550Mb and in XTM Suite to less than 150Mb.

- Source files in project creation
- Reference material for projects or customers
- Translation memory import
- Terminology import
- Customer data import
- User data import

If you have files that exceed the supported file size, compressing them into a zip file may reduce their size.

2. XTM Product Description

XTM is an enterprise scale translation management system (TMS) incorporating advanced workflow, translation memory and terminology tools. Accessed via a browser, XTM gives you the flexibility and control to create and manage even the most complex translation projects.

XTM is available as **XTM Suite** to install on your own server or as a SaaS (Software as a Service) branded **XTM Cloud**. Both versions include the following functionality:

Standard modules

The following modules are included as standard with all versions of XTM

XTM Workflow
This module allows Project Managers to create and manage projects. You can load the source documents and apply a template for regularly used settings. Alternatively you can manually set the target languages, define which TMs and terminology are to be used, assign one of the customisable workflows, and allocate translators and reviewers to tasks. You can easily subcontract work to LSPs while maintaining full control over the project, via the up to date status overview. Users receive email notifications of allocated tasks. Customer proposals and supplier costs are automatically calculated and can be sent via email. Managing large projects for simultaneous translation into multiple languages has never been easier.

XTM Engine
XTM Engine automates the task of preparing the file for translation. It extracts the text from the document, and segments the text into sentences or phrases. Then it applies your translation memory and links into your chosen machine translation system to provide the translator with in-context exact matching, leveraged matching and fuzzy matching. At any stage of the process XTM Engine provides a preview of the translated document as either .pdf or .html. Following translation and review it creates the translated document and stores the new translation memory.

XTM Workbench
The web-based Translator's Workbench provides a full suite of easy to use tools to help translators work efficiently. Fast job turnaround times are possible as multiple translators can work on the same job simultaneously. The system includes real-time metrics, concordance and previous versions of each text segment. If required you can control the length of the target text or add comments to segments.

XTM QA Manager
The quality assurance component ensures your translations are top quality. Your translations are checked for spelling using one of the 90 plus different language dictionaries. The text is checked for formatting, punctuation and localization. You can also run objective tests on the quality of translation using the linguistic quality assessment (LQA) functionality.

XTM TM Manager
The translation memory management system enables you to maintain your translation assets, import new TM. Additionally you can export selected TMs in an industry standard format for reuse in other translation tools. The TM is stored as pairs of phrases in a database and to aid selective reuse, can be

tagged with user defined tags.

XTM Terminology
XTM incorporates a full terminology module. This database of terms includes a concept, definition, context, image, multilingual translations, and comments. In XTM Editor, the system identifies and highlights terms in the source text that are in the term base. XTM then displays the approved translation and additional data about the term in a popup window. This feature facilitates a consistent use of the agreed terminology during translation. You can automatically generate a list of terms from your source file or import a list of existing terms into XTM and then edit or add new terms directly from the Workbench.

XTM Xchange
XTM Xchange brings together translators and users with translation requirements. There is a directory where freelance translators and companies can publish their details to allow agencies and companies to see their skills and references and match them with their job requirements. The marketplace enables users to post localization jobs, and other registered users to quote for the work and if selected, complete the task using XTM.

Optional modules:

XTM Portal
This module can be integrated into your customer facing website to allow your customers to start translation projects. They are able to upload files, specify target languages, and other requirements and then they receive a quotation, which they can accept and pay for. Customers can also create an account which allows them to view and manage their own projects.

XTM Connect
XTM Connects makes integrating XTM with other systems straight forward. It includes out the box connectors for the common CMSs and also and an SDK of fully documented web services with sample code that allow you to build custom integrations. Currently the following out of the box connectors are available:

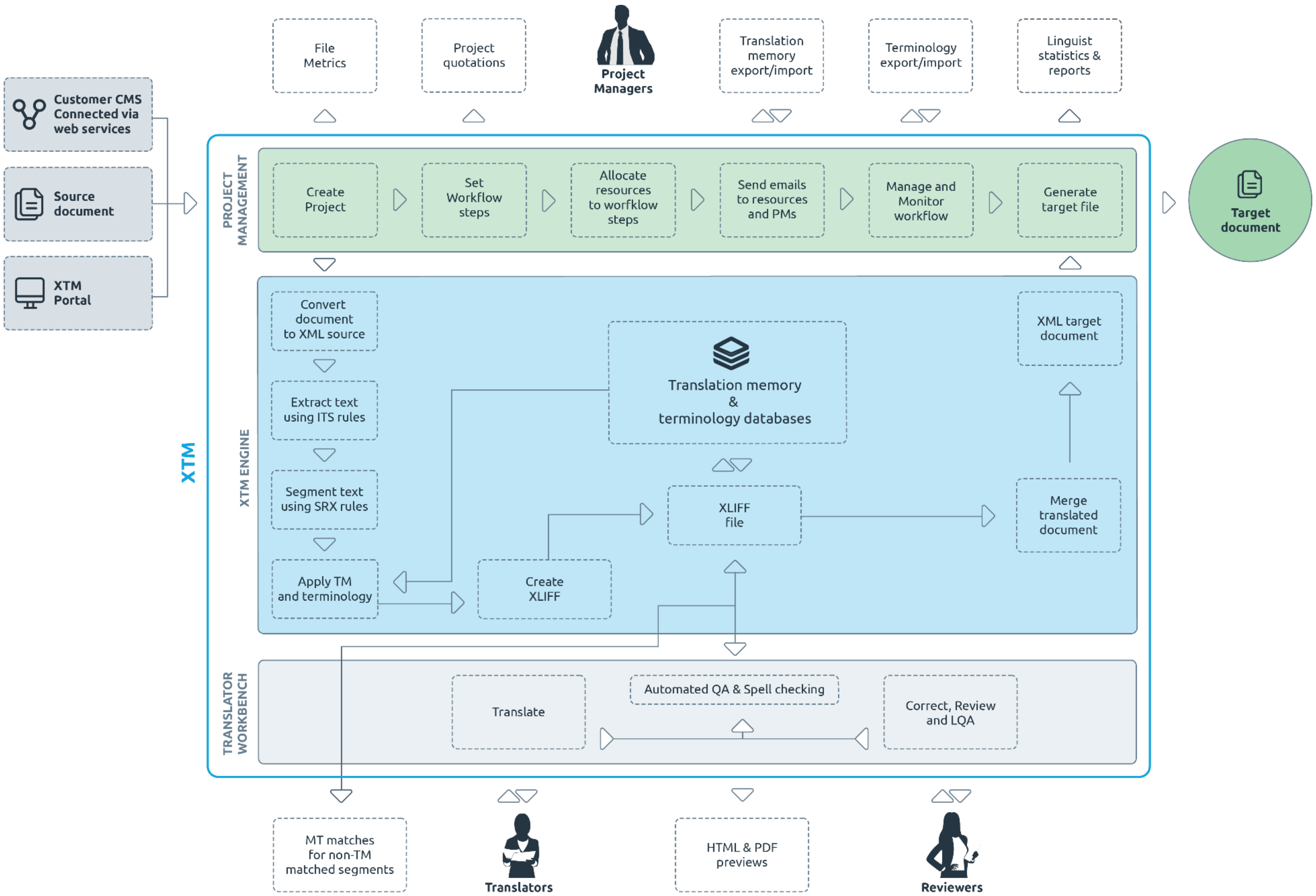
- XTRF
- Plunet
- Easyling
- Wordpress
- Drupal
- Adobe Experience Manager
- Claytablet (AEM, Sitecore)
- Ixiasoft
- Instinct tools
- SDL Live Content
- Autocad
- InDesign server

Please contact sales@xtm-intl.com for pricing of these options.

Standards Support

XTM International is committed to using and developing open standards. We are active in the many Open Standards Technical Committees. For a full list of the standards supported by XTM please see our website. http://www.xtm-intl.com/files/content/xtm/resources/XTM%20Standards%20Support.pdf

XTM Translation Project Dataflow



3. XTM for Administrators

XTM Licencing

XTM suite is licenced for a number of concurrent users, so any number of users can be created in the system, but only the licenced number of users can connect at any one time. All types of user are counted as a licenced user.

XTM Cloud licencing depends on the account type purchased. A freelance account and a group account are for named users. In this type of account you can only create the number of users specified in the subscription agreement. Enterprise account subscriptions are similar to XTM Suite and are for concurrent users.

A registered XTM Portal user by default become a Customer Project Manager with the Create and view access rights, and does not count as a licenced user. However if this account type is upgraded to provide fuller access to the project manager module in XTM, then they are counted as a licenced user.

Logging in

If you are using XTM Cloud the first time you log into XTM you will be asked to activate your PC. You will receive an email, click on the link in the mail and then XTM will confirm that your PC is registered.

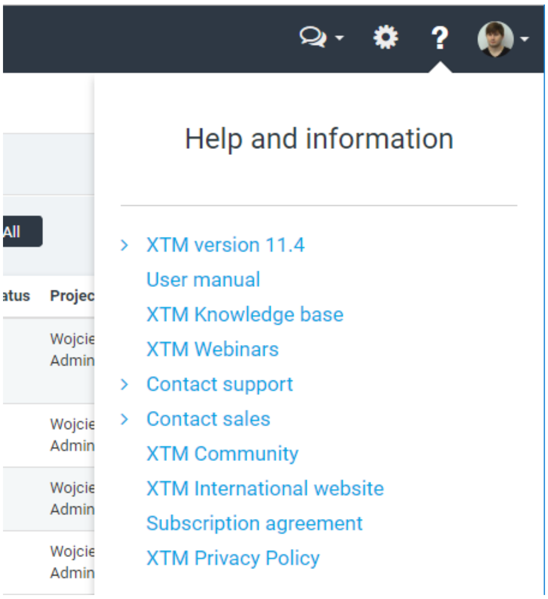
You will firstly be redirected to a page to change your password from the password sent by email to you when the account was created. We recommend that you use a password that you can easily remember containing letters and numbers and with at least 6 characters.

Logging out

It is always best to use the logout button rather than simply closing your browser. In this way XTM knows that you have quit the program and will release any records that are assigned to you and which may be locked. In case you do not log out properly or your internet connection fails, there is another mechanism. While you are logged into XTM and actively working, your browser sends a heartbeat to the system informing it that you are still active. If XTM does not detect a heartbeat for more than 60 minutes, it assumes that you are no longer active and closes the session automatically.

Help and information

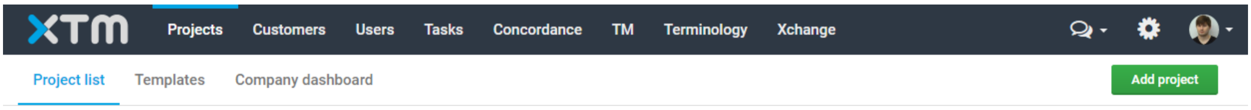
The question mark located between the configuration cog icon and your profile picture opens the Help and information sidebar that provides quick access to help resources. It includes a link to this document, knowledge base How to… articles or XTM webinars. In addition, you can use the XTM Community to get help from your industry peers or contact sales or support. The subscription agreement and XTM Privacy Policy are available for reference in the side bar as well.



Help and information side bar

Administrator options

The options you will see as an Administrator will depend on the type of account that you have and the access rights that have been allocated to you. For multi user XTM Cloud accounts and XTM Suite systems the Administrator has the options shown below.



Options for an Administrator user

A freelance account has administrator rights but as it is a single user account the users tab is not required.

Options for a Freelance user in XTM Cloud

The following sections only cover the Configuration and Management tabs as they are specific to an Administrator. The other tabs are also available to Project managers and so described in that section of the manual.

Configuration

There are a number of options within the configuration tab. It depends if you are using XTM Cloud or XTM Suite which of these options are visible.

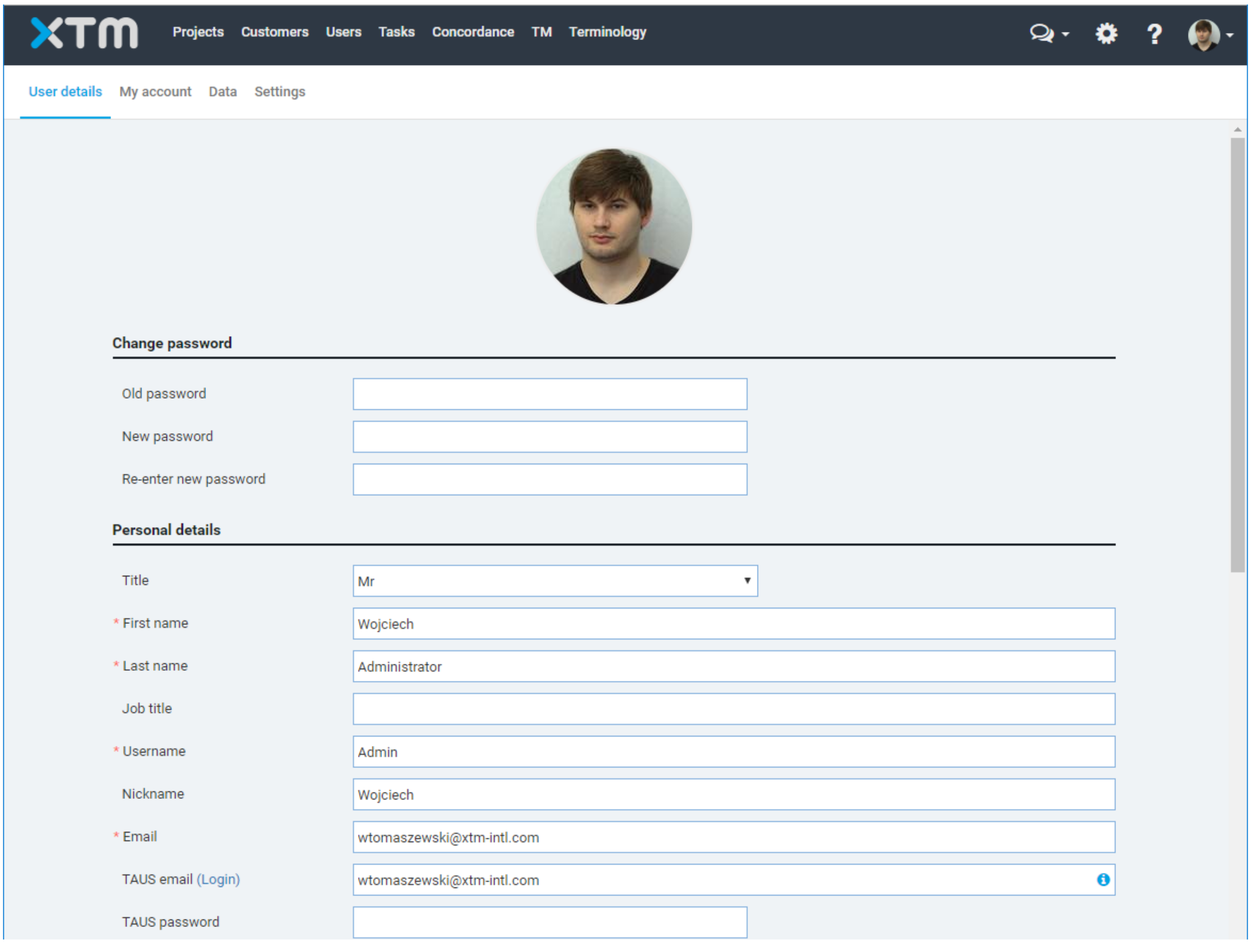
1. User details
2. My account
3. Data
4. settings

Items 2, is only visible if you are using XTM Cloud the SaaS version of XTM.

User details

This form allows you to update your basic details and includes fields for your photograph, email address, your password, and the preferred interface language.

You can also set your availability for work. For example, you can set yourself to unavailable if you are busy, sick or on holiday. Project Managers can see a user's availability status which informs them whether the user can accept work orders or not.



Administrator user details

The first time you log on you will be asked to set your time zone and the date and time format from the pull-down list.

When TAUS is enabled in the system, users can specify their e-mail and password for connection with the TAUS Dynamic Quality Framework (DQF). This dashboard enables project managers to track translation productivity. To create your TAUS account, click the Subscribe button. To find out more about the TAUS DQF go to https://www.taus.net/evaluate/about-quality-dashboard.

My Account

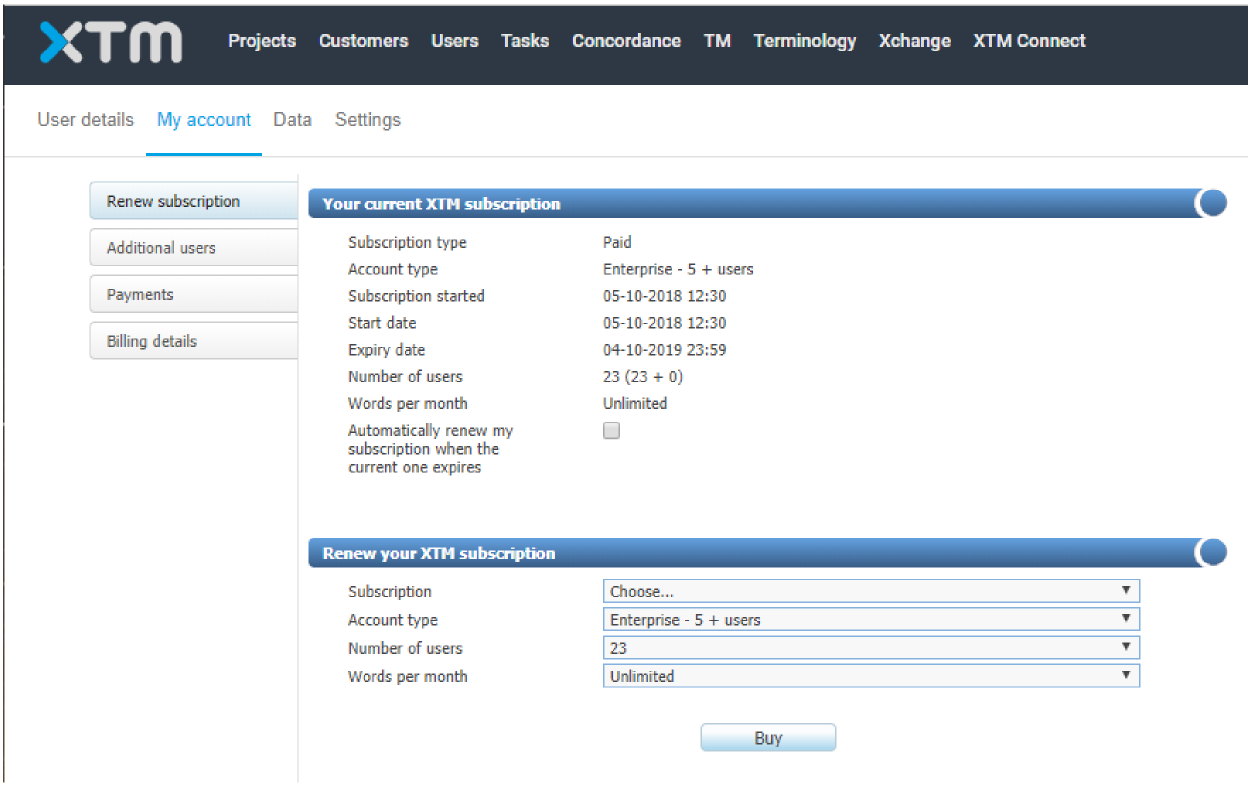
The My account tab has five sections which will appear depending on your type of account:

My Account - Renew subscription

The top section gives the details of your current XTM subscription. This includes your account type, start and end date, number of users, your monthly word allowance and how many you have left to use and whether you want to renew your account automatically each month. If the automatic renewal is selected you will receive an email from XTM before your renewal date giving you the renewal details and also another email providing an invoice and confirmation once the renewal has taken place.

The lower section allows you to manually renew your subscription. You can select the new expiry date, the type of account, the number of users, and the word allowance per month. XTM will then calculate the cost for you in Pounds Sterling, Euros and US Dollars. Select your desired currency and click the buy button. This will take you to the payment screen where you can enter your credit or debit card details.

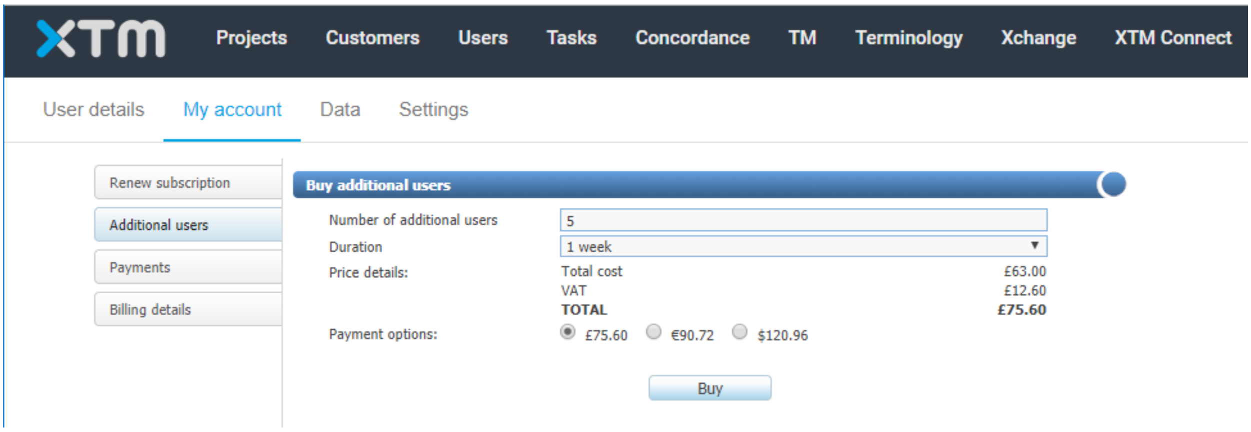
When you change your subscription any unused days of your existing subscription are credited back to you and a new subscription created.



My account tab – Renew subscription

My Account - Additional users

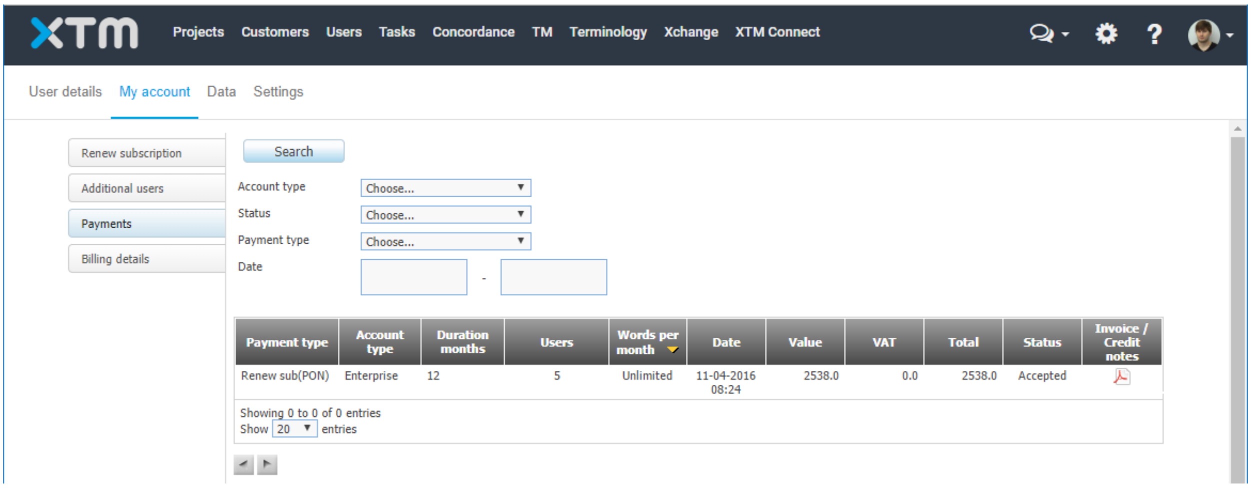
If you have an Enterprise account, then this section gives you the option to purchase additional users for a short period of time. This is useful if you have an unexpected, large project requiring additional resources. Enter the number of additional users you require and select the duration form the drop down menu. The cost will be displayed in GBP, € and US$. Select your currency, click Buy and you will be then able to enter your credit card details.



My account tab – Additional users

My Account - Payments

The payments tab displays a list of payments you have made to XTM International for your subscription to XTM Cloud. You can download copy invoices from this screen by clicking on the invoice icon in the last column.



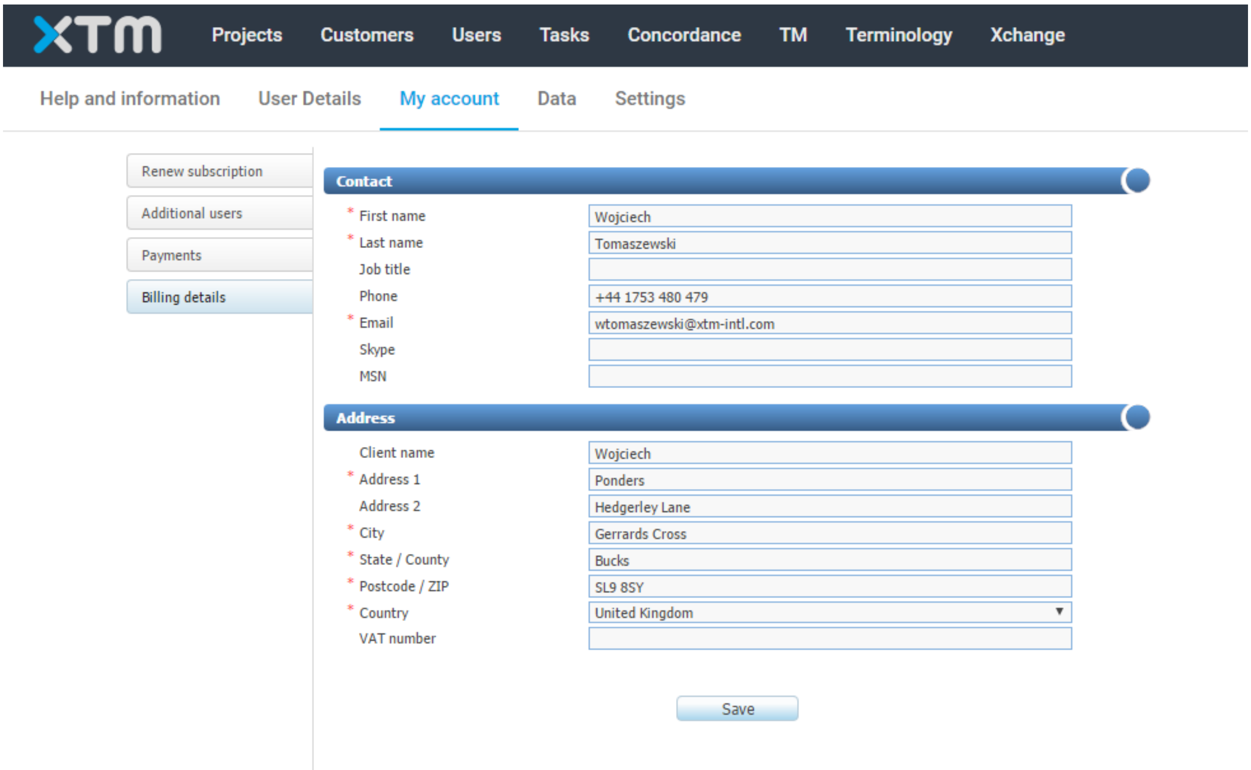
My account tab – Payments

My Account - Additional words

If you have a Freelance or Small Group account with a monthly word limit, this section allows you to buy additional words for your current subscription.

My Account - Billing details

Your billing details will be completed automatically if you have signed up for XTM Cloud via the XTM International website. If on the other had you wish to upgrade a trial account to a full paid account you will need to complete this page before performing the upgrade.



My account tab – Billing details

Data

This section allows the administrator to customise XTM. Changes made here are used as the default values when creating new customers. It is then possible to change the settings for individual customers. See Project manager – Customer Editor.

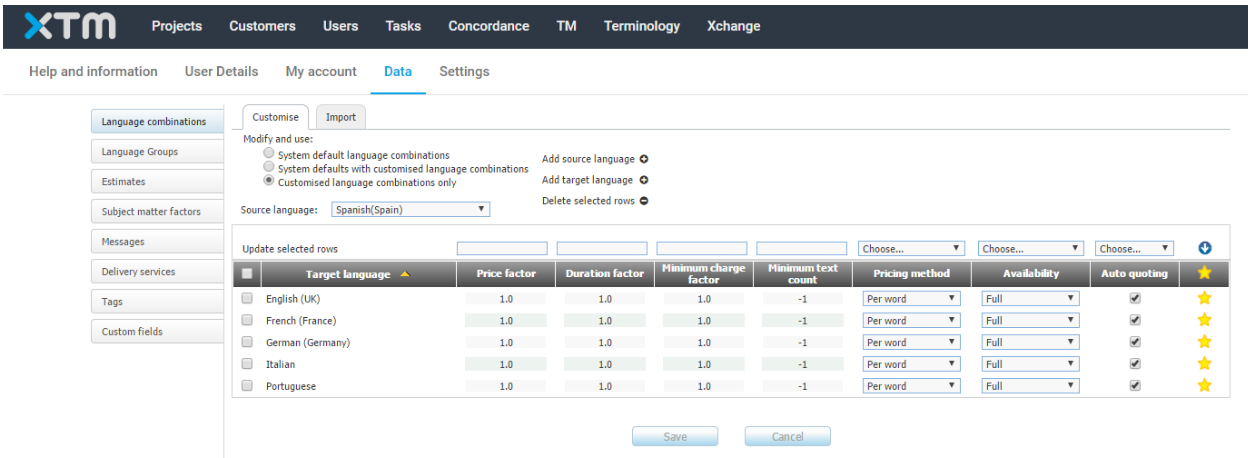
Data - Setting language combinations

XTM comes with a full set of language combinations allowing project managers to choose any source and target language when creating a project. However many users only work with a limited set of source and target languages. In the language combinations section, you can reduce and customise the available languages that you use. As an administrator you can set the language combinations for the entire XTM system and then you or project managers can then set specific language combinations for individual customers.

Customise tab

On the Customise tab there are three options for you to modify and use language combinations,

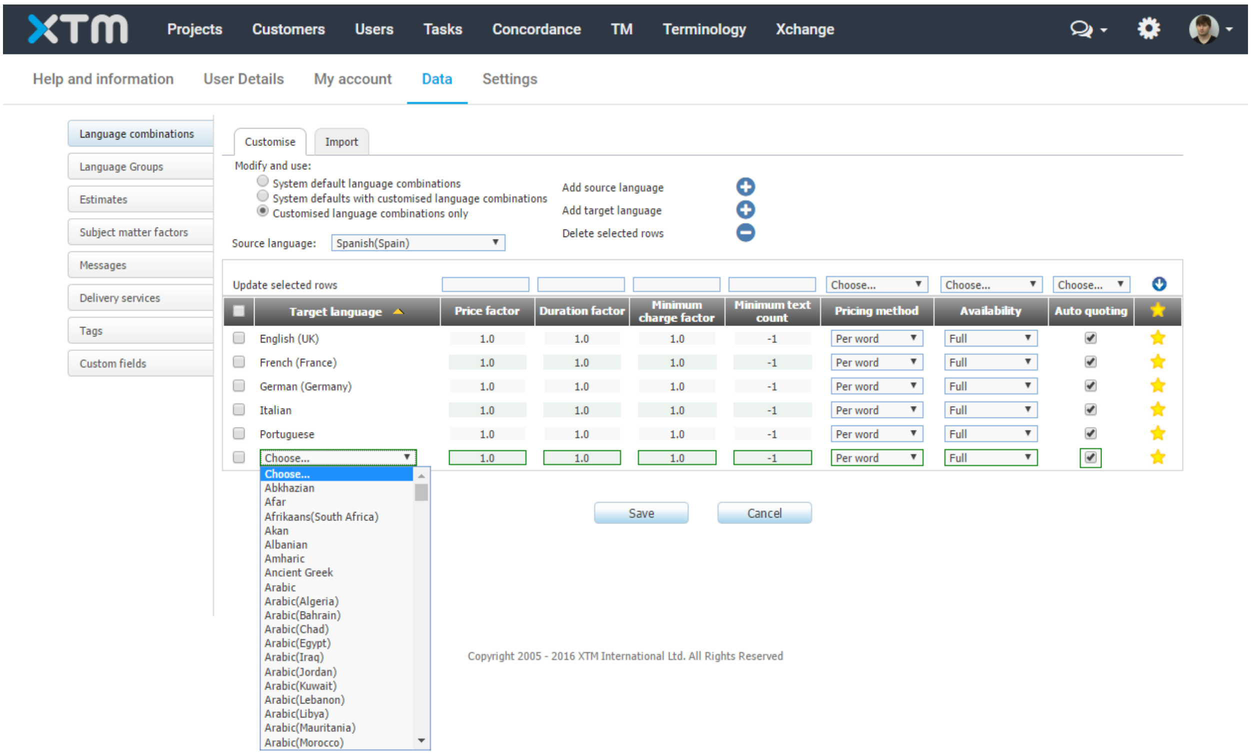
1. “System default language combinations”. This is the full set of unmodified language combinations.
2. “System defaults with customised language combinations”. This is the full set of language combinations in which you may have customised some parameters.
3. Customised language combinations only. This is only those language combinations that you have customised.



Customising language combinations

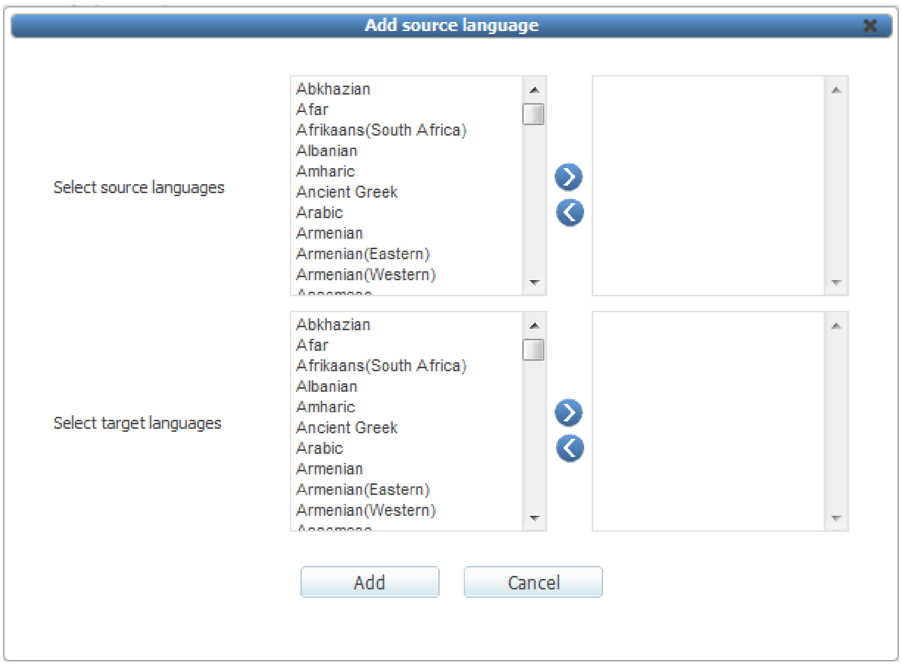
When you have selected one of the customised options it is possible to add and delete source and target languages.

To add a target language to an existing source language, firstly select the source language from the drop-down list. Next click on the Add target language button and a new line will appear at the bottom of the target language listing. Select a target language from the drop-down list and edit the factors if required.



Adding a target language

To add a new source language and the corresponding target languages click on the Add source language button and the following window will appear. You may select multiple source and target languages and XTM will create all the possible language combinations.



Adding source languages with their respective target languages

To delete language combinations, select the row to delete by checking the box in the left hand column and then click the delete selected rows button.

The lower section on this page enables you to edit the factors used for creating estimates for each language combination. In this location customising the factors sets the default values for the entire system. The factors can be customised for each customer as well – See Editing Customers on page 102.

You can change:

- **Price factor** – The base price is multiplied by the price factor so if it is 1 (the default) the price doesn't change, if it's greater than 1 the price is increased and if it's lower than 1 then the price is decreased.
- **Duration factor** - Similar to the price factor but this changes the duration of the translation process and has an impact on the delivery date.
- **The minimum charge factor** -The customer "minimum charge" is multiplied by "minimum charge factor" to increase the minimum charge (>1), decrease (<1) or just leave as it is (=1).
- **The minimum text count** (either words or characters) The default value can be overwritten by specifying any value >= 0 in that parameter. -1 means that the default should be taken.
- **Pricing method** If you charge by character count rather than word count then set this here. Use the character count for languages such as Japanese and Chinese.
- **Availability** There are three available alternatives:
    - Full – This language combination is available to customers and PMs
    - PM only – Only project managers can create projects with this language combination.
    - Unavailable - You do not offer this language combination.
- **Auto quoting** This field allows you to distinguish between commonly used language combinations that your agency can start translating immediately (auto quoted) and language combinations where you need to contact linguists first and you cannot predict the price or the delivery time (non-auto quoted).
- This column displays how the language combination has been defined. A yellow star indicates that the combination has been defined for the entire system and no star means that the system is using default settings.

Changing the factor in each cell determines how the automatic quotation is produced. The last column "Auto quotation" determines whether the customer can receive the quotation automatically from the system or whether they are directed to speak to a project manager.

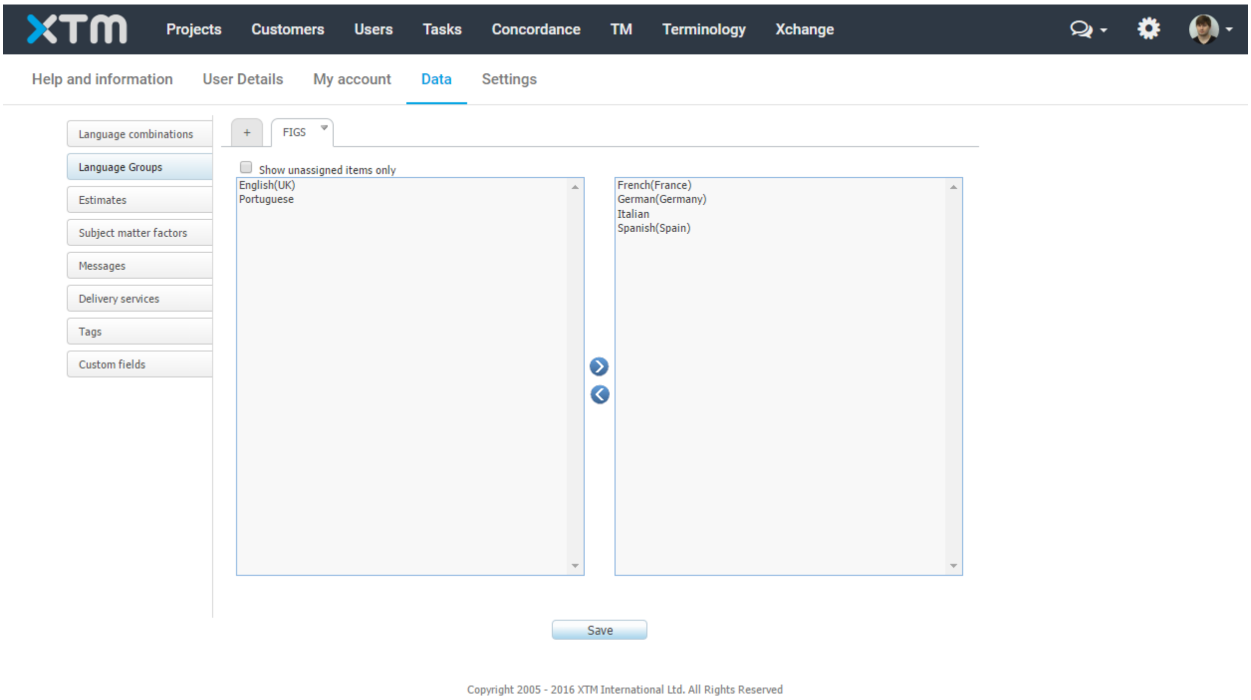
Import tab

On the import tab you have the facility to upload an XML file with the required language combinations. You may download example files by clicking on the green button. You can use these files as they are, or alternatively use them as templates and modify them according to your requirements. Additionally there is an example of a template is shown in Appendix 2 at the end of this manual. When the files are ready upload them to XTM by browsing to the file and clicking the import button.

If you click the "Remove existing combinations" check box, the existing language combinations will be cleared and the new ones created. If the check box is not clicked then any new language combinations will be added to the existing ones.

Data - Language Groups

Language groups are used to facilitate the creation and maintenance of linguist rate cards. A group of languages such FIGS can all be given the same rate per word. Thus instead of having to maintain multiple rate cards you only need to manage one.

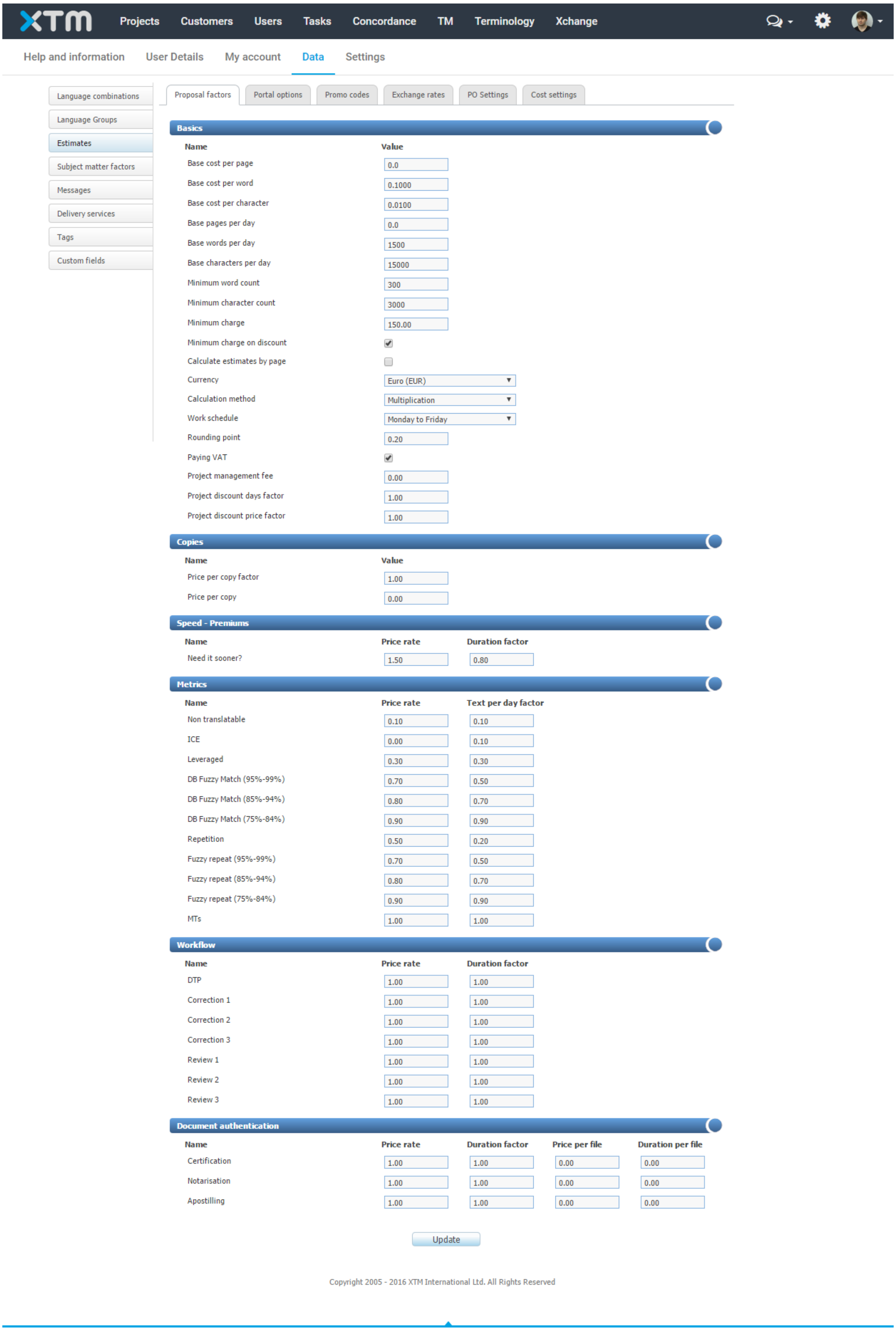


Creating a language group

To create a group click on the + icon and move the desired languages to the right hand box. Then click Save.

Data - Estimates

Proposal factors



Setting the default estimate factors for XTM

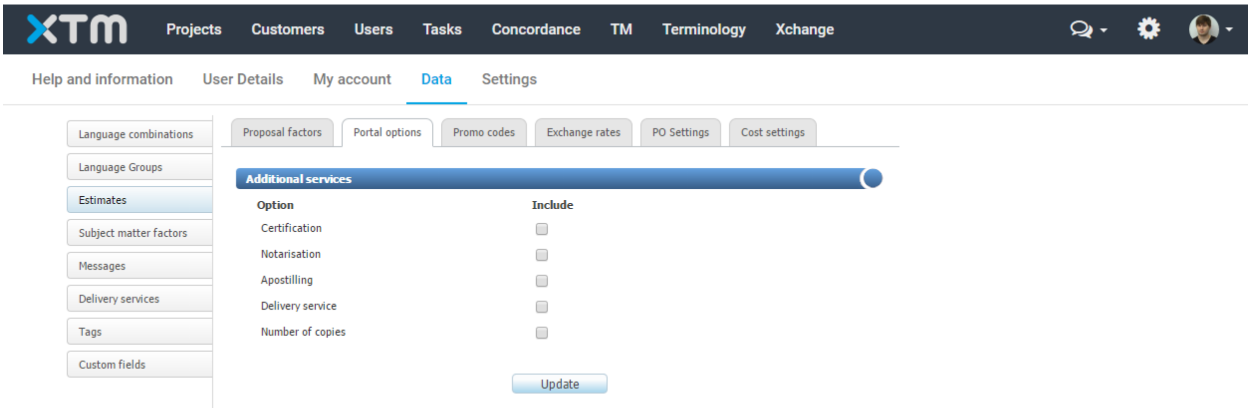
Using this tab you can set the default factors that are used to automatically calculate the cost and duration estimates for customers. The factors are:

- Base cost per page
- Base cost per word
- Base cost per character
- Base words per day
- Base characters per day
- Minimum word count
- Minimum character count
- Minimum charge
- Minimum charge on discount
- Use estimates per page
- Currency
- Calculation method
- Work Schedule
- Paying VAT
- Project discount days factor
- Project discount price factor
- Factors for the number of copies
- Speed factors – Discounts. There are three levels which become progressively slower and cheaper
- Speed factors – Premiums. There are three levels which become progressively faster and more expensive.
- Metrics factors for all the different types of matching.
- Price and duration factors for additional steps in the workflow
- Actual price or factors for document authentication

It is also possible to set estimate factors or actual prices for the number of copies, speed of delivery, metrics, workflow and document authentication. For more information about the estimate factors please see Estimates under Project Editor

Portal options

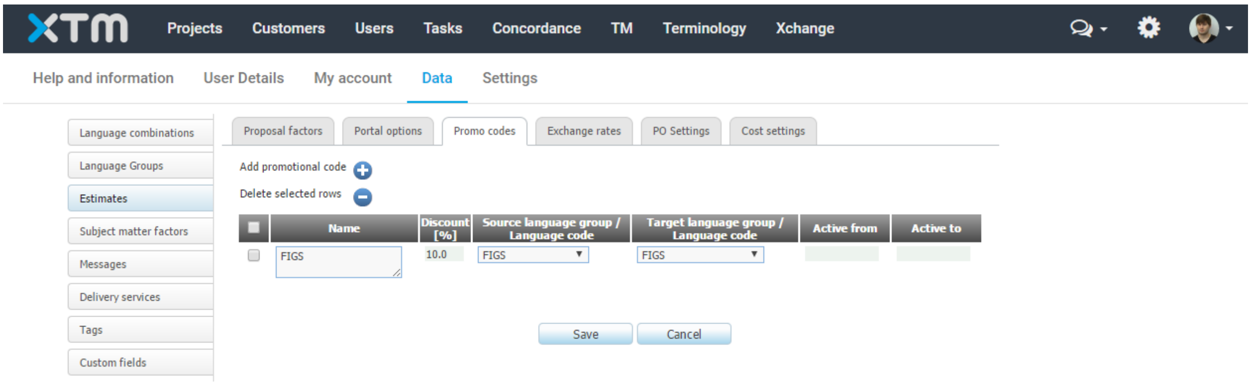
If you have purchased XTM Portal then it is possible to display a number of options for the customer to select. Checking the boxes on this page displays the option in XTM Portal. The cost for these services are set on the proposal factors page.



Setting the options for XTM Portal

Promo codes

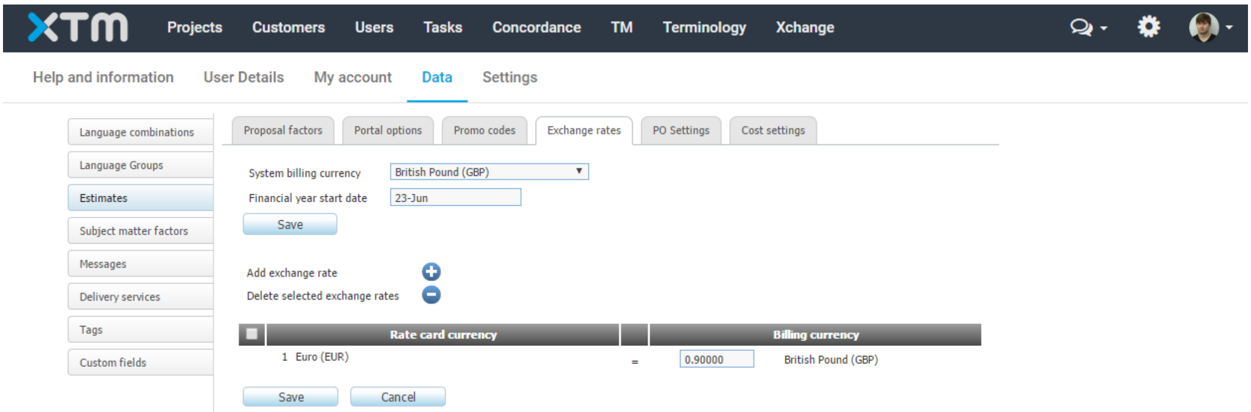
If you have XTM Portal activated on your system then you will see this screen. It allows you to set a promotional code to give your customers a discount on defined language pairs.



Creating a promotion code for XTM Portal

Exchange rates

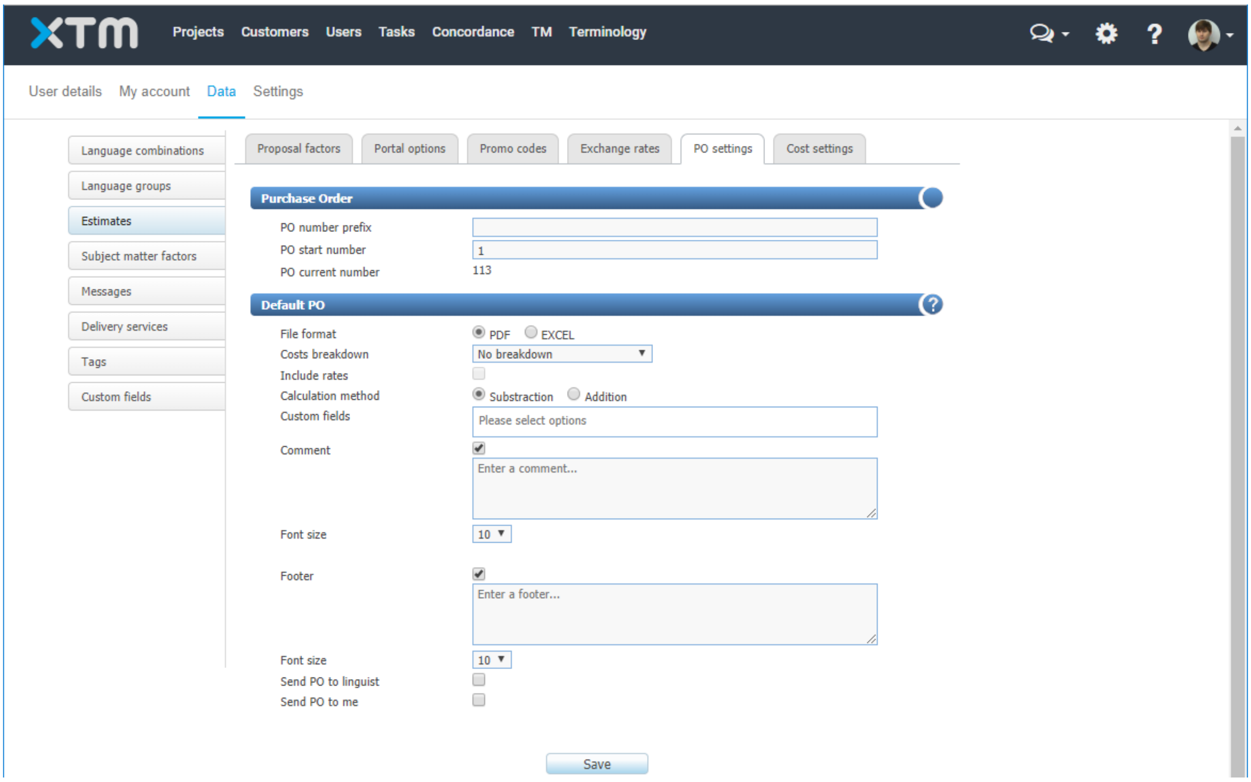
The supplier's rates cards can be in any currency and so it is necessary to set the exchange rates that XTM will use to calculate costs in your billing currency. Firstly enter your billing currency and then add the desired exchange rates for suppliers you use.



Setting the currency exchange rates for use within XTM

PO Settings

Each purchase order created is given a sequential PO number. The PO settings tab allows you to format and set the purchase order number that is automatically generated for all POs. You can give the purchase order number a prefix and set the start number. The current PO number is displayed below the two fields.



Configuration > Data Estimates > PO settings screen

Purchase Order. The PO start number field lets you count purchase orders from the number of your last issued purchase order number when it is different from current PO number. PO number prefixes can be used to adjust translation purchase order numbers to your organisation needs.

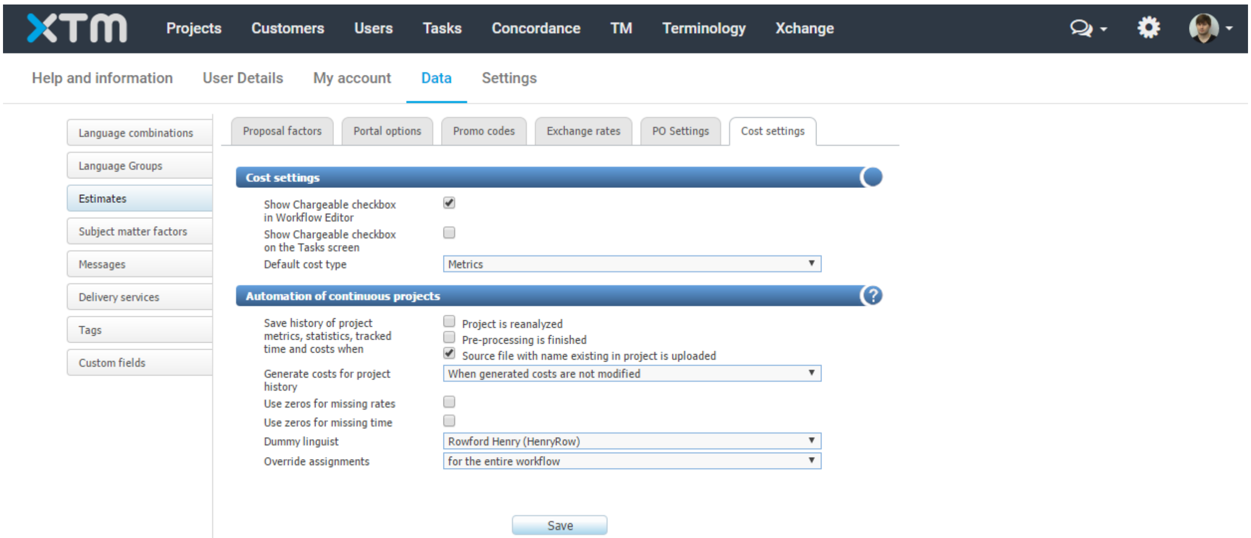
Default PO. The default PO section options specify the appearance and layout of default purchase orders generated from XTM. Purchase orders can be generated as PDF or Excel files with a cost breakdown into language or languages and workflow steps. It is possible to list vendor rates in the PO when including a breakdown into Languages and workflow steps.

Costs can be calculated in the PO by summing up rates multiplied by the number of words in the specific match category or by subtracting them from the total value of the PO.

Custom fields, a comment and a footer can be included in the PO. The comment and footer font size can be adjusted. Also, there are options to choose whether POs should be sent to the linguist and the purchase order creator.

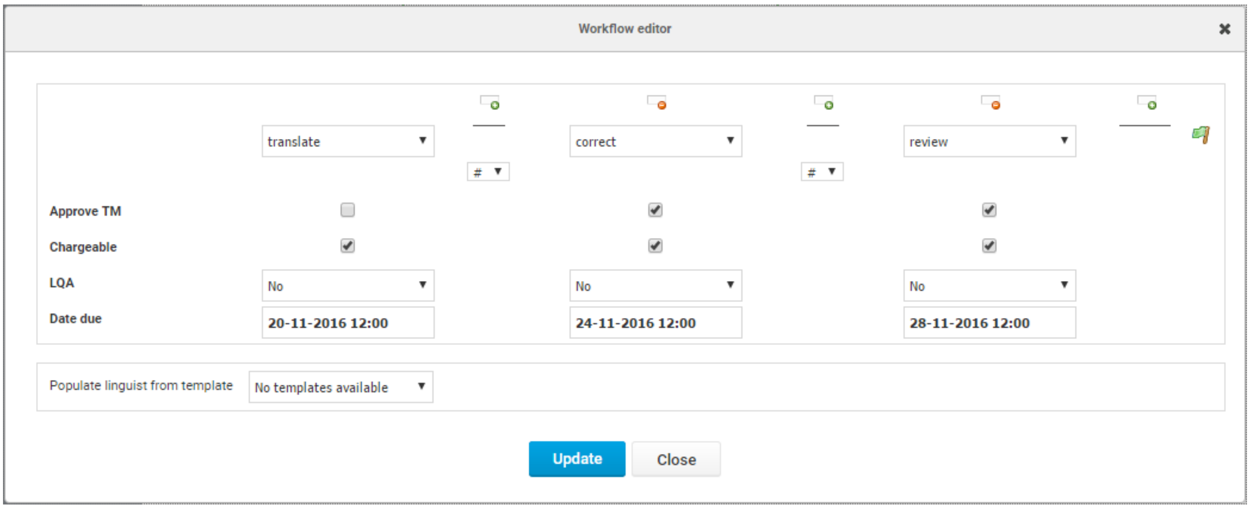
Cost Settings

XTM has an option to allow you to set whether or not a step in the workflow is chargeable. This can be useful if the customer has pre-purchased a certain level of service. Then if this level of service is exceeded then the step may become chargeable. The cost settings tab allows you to switch this feature on and off and also decide if it should be accessible by linguists or only project managers. You can also select the default cost type used for calculating estimates, such as metrics, current metrics, statistics source or statistics target.



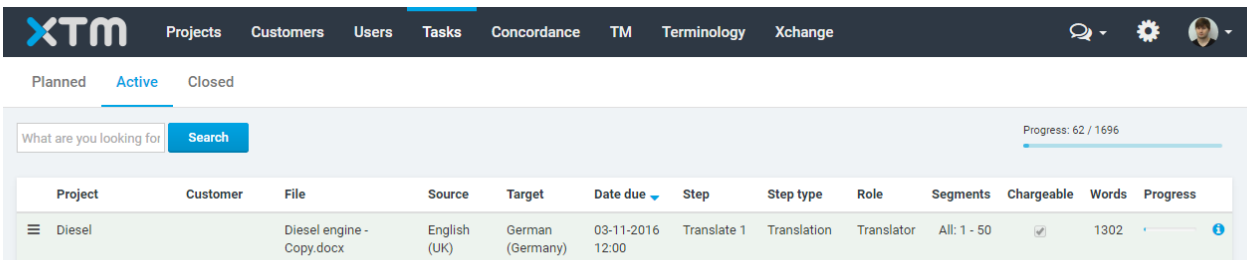
Enabling or disabling the chargeable check box

When it is checked a Chargeable box appears in the workflow editor which by default is checked.



The chargeable check box appears in the Workflow editor

For a linguist the chargeable box appears as an additional editable column on the Tasks tab.

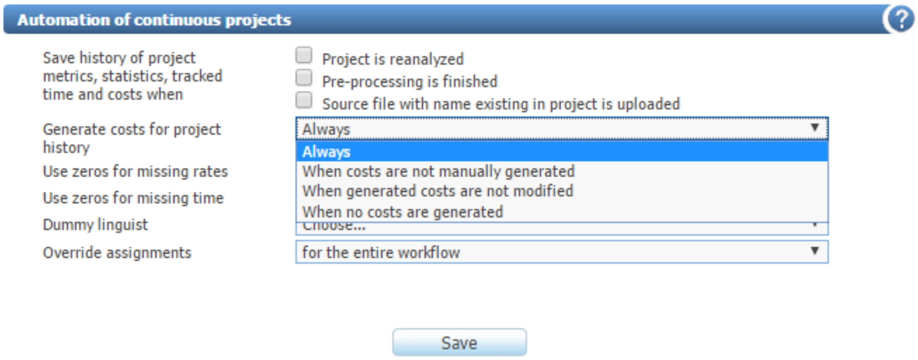


The chargeable check box appears as an editable column on the Tasks screen

Automation of continuous projects

This section provides the settings for automatically generating cost estimates for continuous projects. A continuous project is a project where the source files are updated with newer versions, in order not to create multiple projects with the same, constantly evolving files.

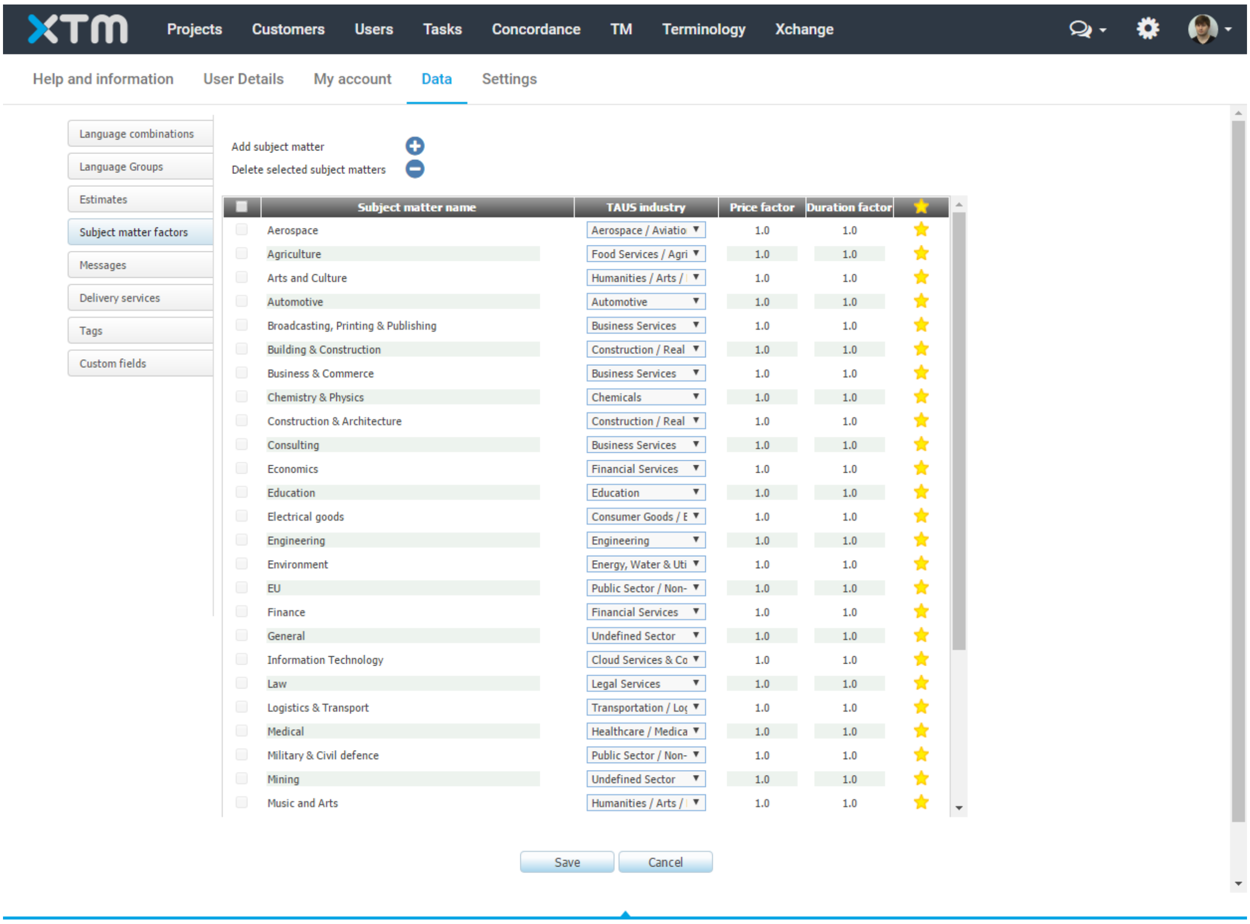
Source files can be replaced multiple times in a single continuous project. Taking that into account, choose when the history of project metrics, statistics, tracked time and costs should be saved for continuous projects. Then, select the condition when cost estimates are generated for the project history.



The options to generate costs for project history

You can set whether you want to use zeros for missing rates or times when linguists do not have rate cards or time tracking is not set up. There is also an option to choose a “dummy linguist” whose rate card settings can be used for automatic cost estimation, either for the entire workflow or only where no linguist is currently assigned.

Data - Subject matter factors



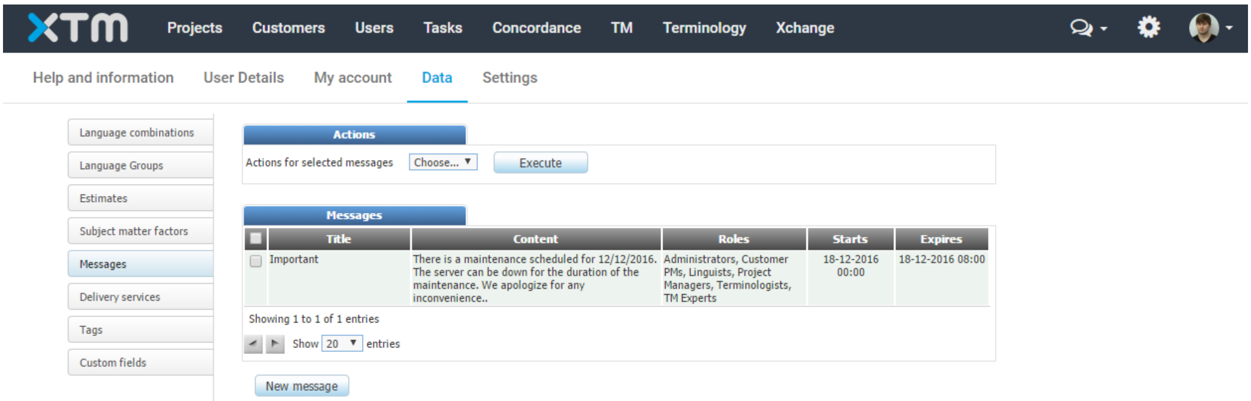
Setting the system default subject matter factors for XTM

The subject matter factors tab allows you to add and delete items in the subject matter list which is used when creating a project.

It is also possible to modify the price and duration factors for each subject matter. The default value is 1.0 for each item. If you increase the factor value to greater than 1 the estimated cost or duration will be increased from the standard. Similarly if you decrease a factor value to less than 1 the estimate values will be decreased.

Data - Messages

You can use this section to create a message to inform users about important issues. The message will pop-up when the user logs on to XTM and as they move from page to page until they click the check box to say do not show this message any more.

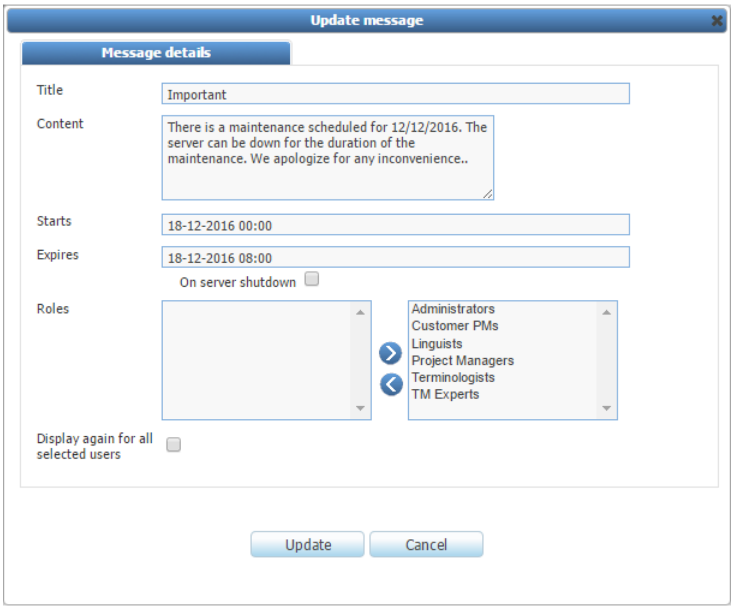


The message management window

A message has the following properties.

- A title field
- The body or message contents
- A start date and time from when the message will be available
- An end date and time when the message will expire
- Alternatively the message can be set to expire when the server closes down
- The type of user or role who will receive the message.

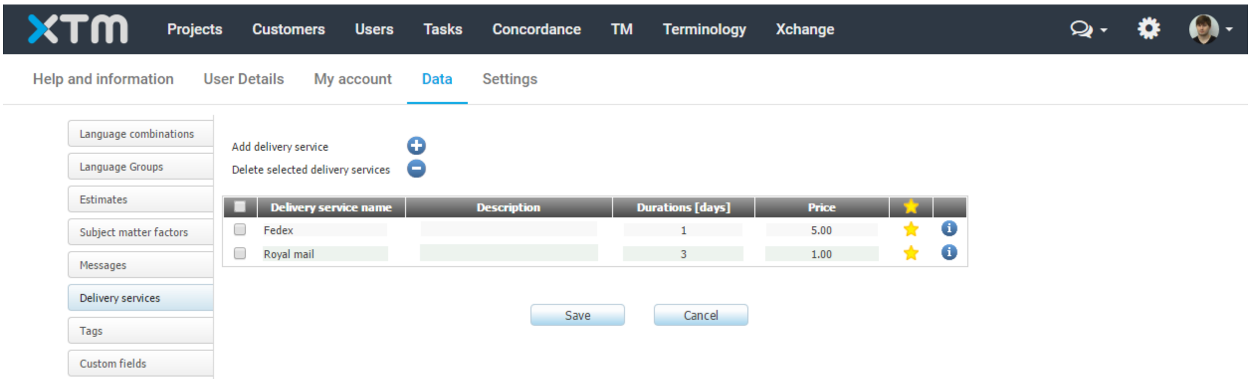
To add a new message click the new message button and the window below appears. Enter the message details and click save.



Creating a new message

Data - Delivery services

If you have purchased XTM Portal then it is possible to define various methods for delivering the target documents and their respective cost and duration.



Defining the available Delivery services for XTM Portal

Data - Tags

Tags Overview

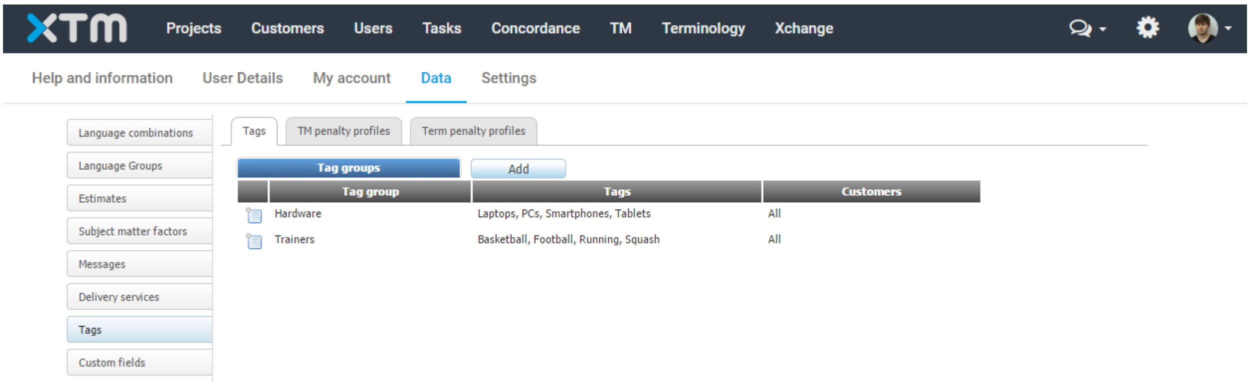
The Tags tab is used to create tag groups with the associated tags and also to set up TM and term penalty profiles.

During project creation project managers can define which tag groups and tags are to be used in the project, then any TM generated during the project will automatically contain the tags.

The TM or term penalty profile compares the TM or term in the XTM database that has been selected for the project, to a defined set of criteria and then applies a penalty to the TM or term which meets the criteria.

Applying a TM penalty profile allows project managers the flexibility to control what TM is used for a project and the priority each match is given when presented to the translator.

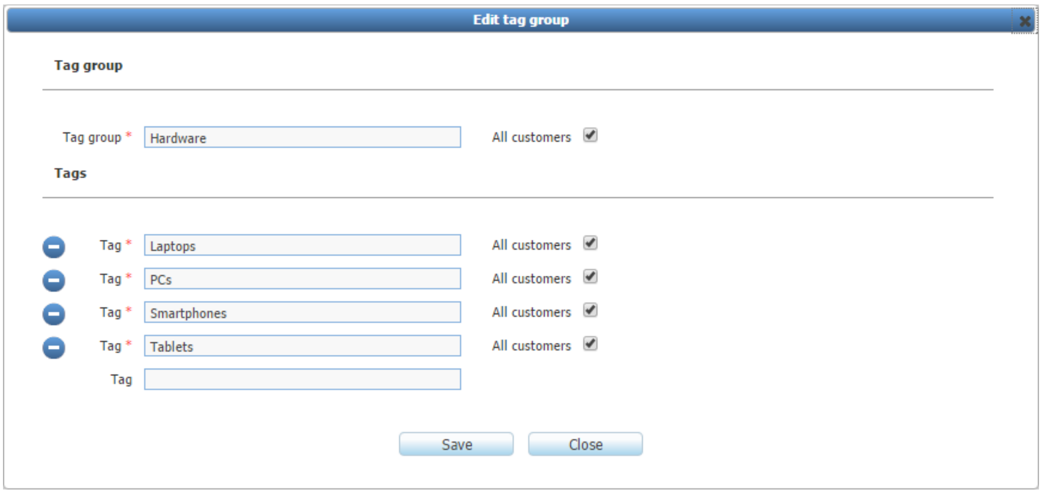
When using the term penalty profiles, the PM can choose whether any terms are highlighted in XTM Editor and the recommended translation offered to the translator.



The listing of Tag Groups with their associated tags

Adding and editing tags

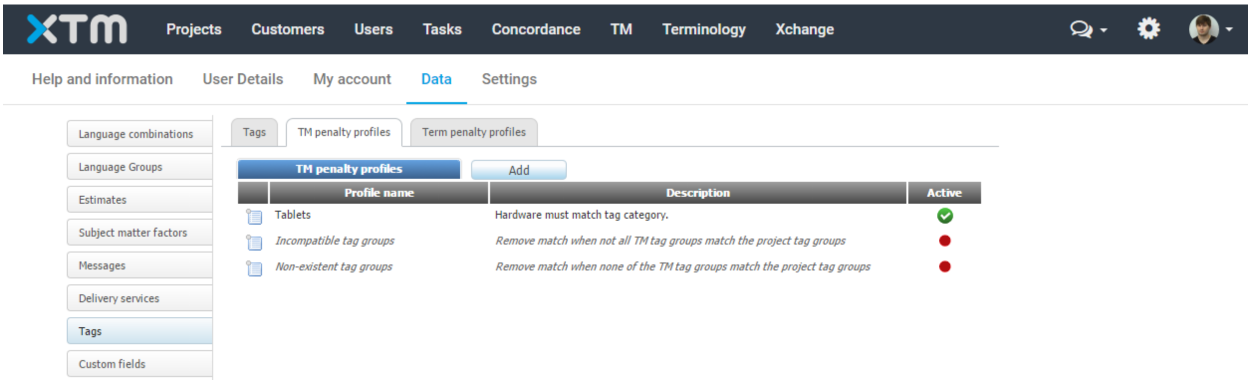
To add a new tag group and the associated tags click the Add button. In the pop up window enter the tag group name and then enter the individual tags. Both the tag group and the tags can be available for all customers or can be customer specific. If you unclick the All customers check box then you can choose for which customers you want the tag group and tag to be available. Neither the tag group nor tag can contain a space so XTM will automatically replace spaces with underscores.



Adding a new tag group with tags

Data - TM penalty profiles

A TM penalty profile enables you to select certain TM from the XTM database based on their tags and tag groups and then penalise the match during the analysis of the source file.



The list of existing TM penalty profiles

To edit, delete or deactivate the TM penalty profile click on the menu icon in the first column of the table.

To create a new TM penalty profile click on the Add button. Enter a penalty profile name and if desired a description. Click the check box to make it active and then choose whether you want to sum the penalties or only use the highest penalty value when a segment is affected by more than one penalty. In addition, select whether you want to sort and display the matches so by the match type or priority.

Next create a rule by selecting a field, an operator, TM Tag Group, and a TM tag if available from a drop down menu. The options available are as follows:

Field	**Comparison**
All tags	All the tags for a segment in the XTM TM database against the tags chosen for this project
None of the tags	None of the tags for a segment in the XTM TM database against the tags chosen for this project
Customer	The customer for a segment in the XTM TM database against the project customer
Status	The XTM status of a segment in the XTM TM database can be either approved or not approved
XLIFF:Doc Status	The XLIFF doc status of a segment in the XTM TM database can be Rejected, New, Translated, Proofed, Validated
Target language	The target language for a segment in the XTM TM database against the target language chosen for this project
Match type is ICE or leveraged	The match is either an In-Context Exact match or a leveraged match.
Tag	One of the tags for a segment in the XTM TM database against the tags chosen for this project
Any tag	Any of the tags for a segment in the XTM TM database against the tags chosen for this project
Match type is variant	The match comes from a translation memory that is a different variant of the target language specified in the project.

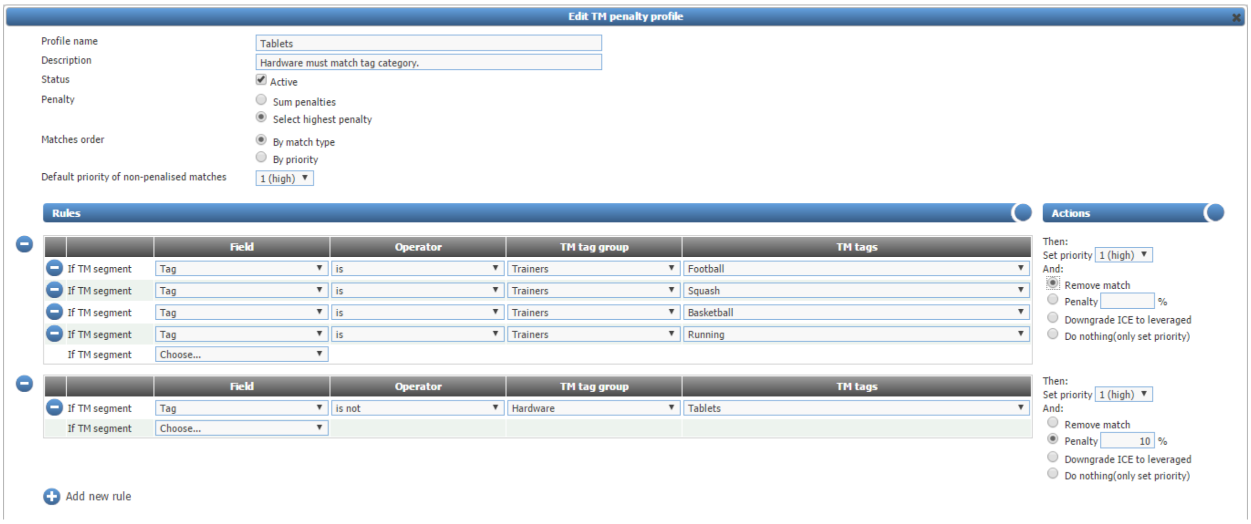
Then to complete the rule enter the penalty which should apply when the criteria are met. Select the priority in which the penalized matches will be displayed and whether an additional penalty action should be applied. You can choose to

1) remove the match
2) specify a percentage penalty that should be applied to the match
3) downgrade an ICE match to a leveraged match
4) only set the priority and perform no other action

When you create penalty actions that affect the priority in which matches are displayed, remember to compare it against the default priority of non-penalised matches. The default priority of non-penalised matches should be higher than the priority of penalized matches.

If you want to favour translations that match the criteria specified in a penalty profile, you can lower the default priority of non-penalised matches, increase the priority of the penalty profile and choose not to do anything else as a penalty action.

Each penalty profile can have multiple rules with their corresponding action.

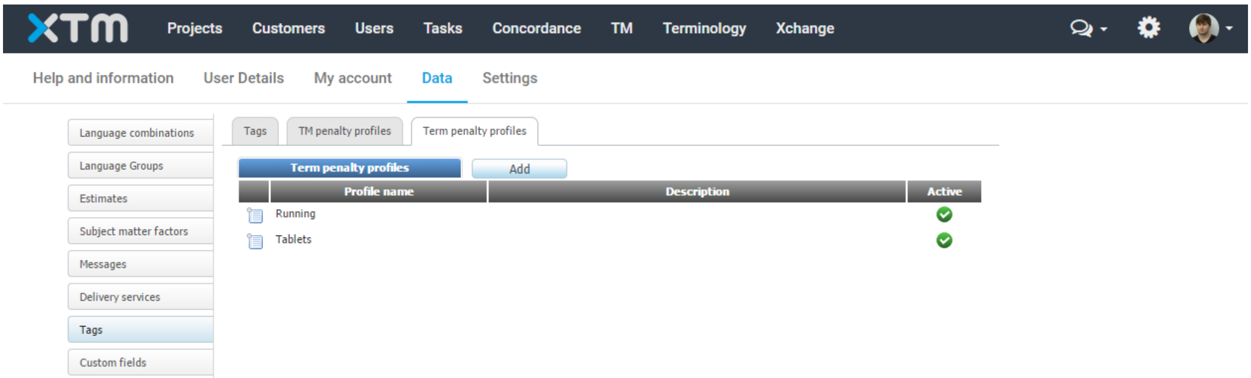


Adding or editing a TM penalty profile

If the penalty profiles contain rules with multiple lines, there is an "AND" between the lines of a rule. If there are multiple rules in the profile, there is an "OR" between them.

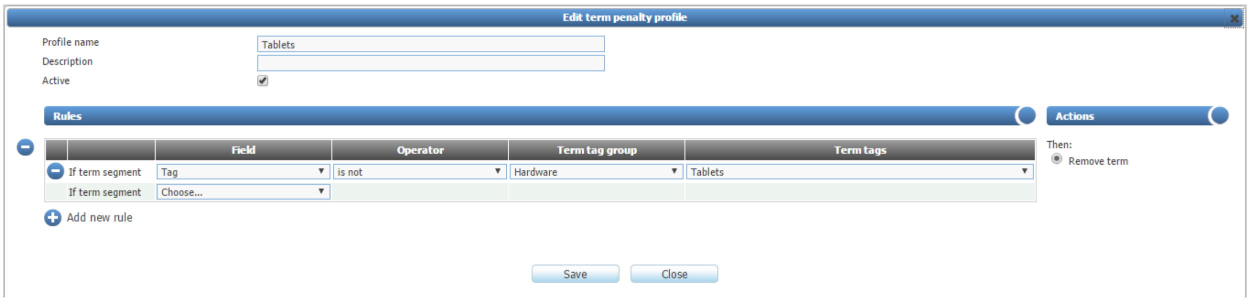
Data - Term penalty profiles

In a similar way to the TM penalty profiles described above it is possible to apply a penalty to term matches



The list of existing term penalty profiles

To create a new Term penalty profile, click on the Add button



Adding a new term penalty profile

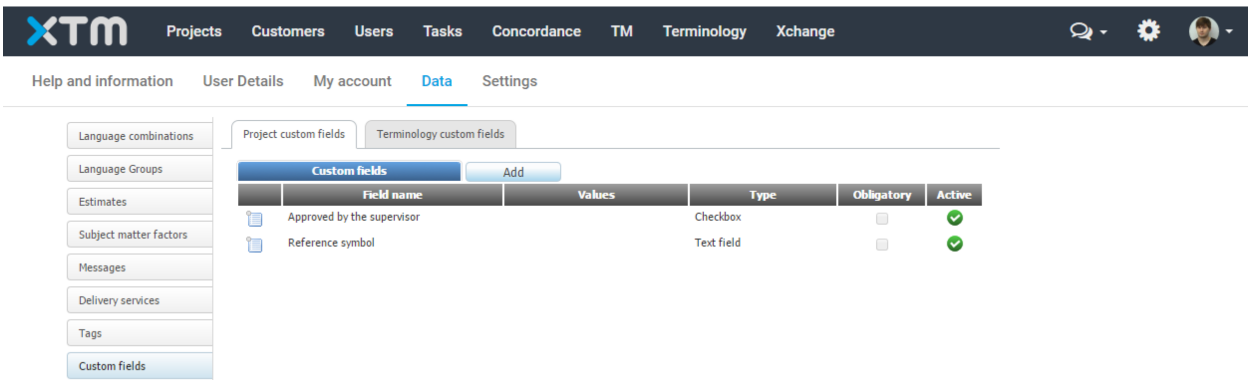
Enter a penalty profile name and if desired a description. Click the check box to make it active.

Next select a tag group, operator and term tags. The only penalty available is to remove the term and it will not be highlighted in XTM Editor.

Finally click Save

Data - Project custom fields

XTM allows you to create custom fields for projects that can be completed during project creation and are available in the advanced search screen.



The list of existing Project custom fields

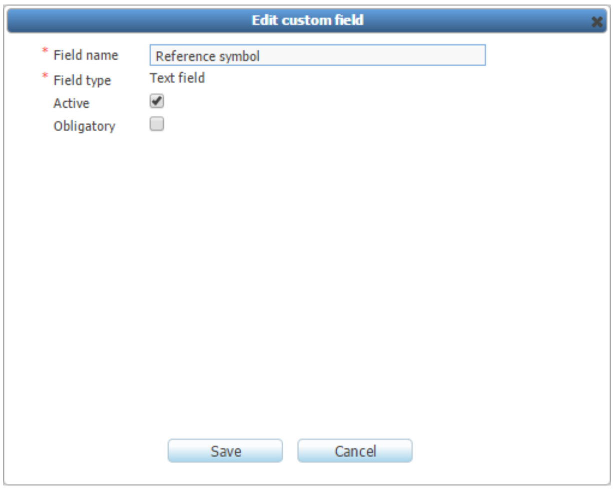
Adding a new Project custom field

Click on the Add button and enter a field name

Choose one of the 6 different types of custom fields

- Checkbox
- Date
- Drop down
- Multiple selection
- Number
- Text

If you choose either Drop down or Multiple selection, then you will need to enter your list of values that can be selected for that field.

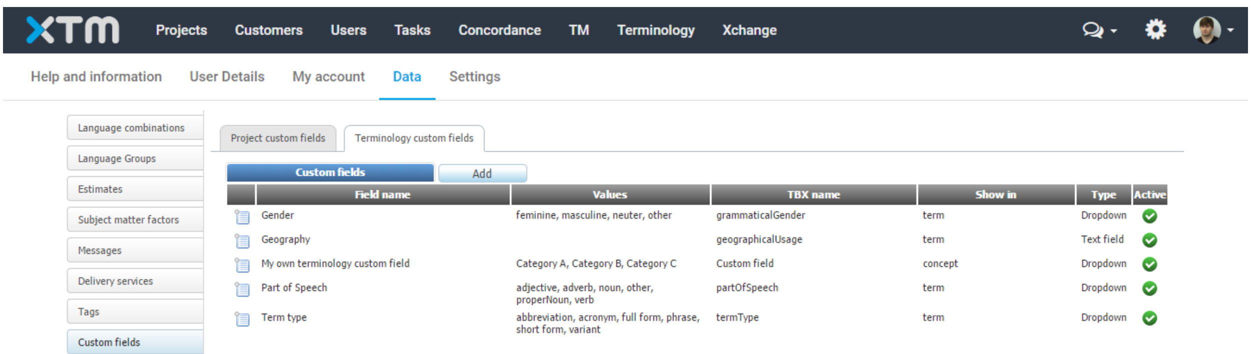


Adding a new Project custom field

Set the custom field to Active, decide if you want it to be obligatory, and then click Save.

Data - Terminology custom fields

XTM allows you to create custom fields that display in the Terminology manager. The fields allow you to add more information to a concept or term.



The list of existing Terminology custom fields

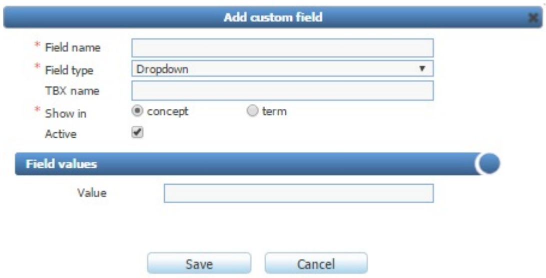
Adding a new Terminology custom field

Click on the Add button and enter a field name

Choose one of the 5 different types of custom fields

- Dropdown
- Hyperlink
- Multiple selection
- Number
- Text

If you choose either Drop down or Multiple selection, then you will need to enter your list of values that can be selected for that field.



Adding a new Terminology custom field

TBX name refers to the term property when it is exported to a TBX file.

The radio buttons concept or term enable you to define where the field should be displayed.

The active checkbox allows you to activate or deactivate this custom field.

Click Save when you have defined the custom field.

Settings

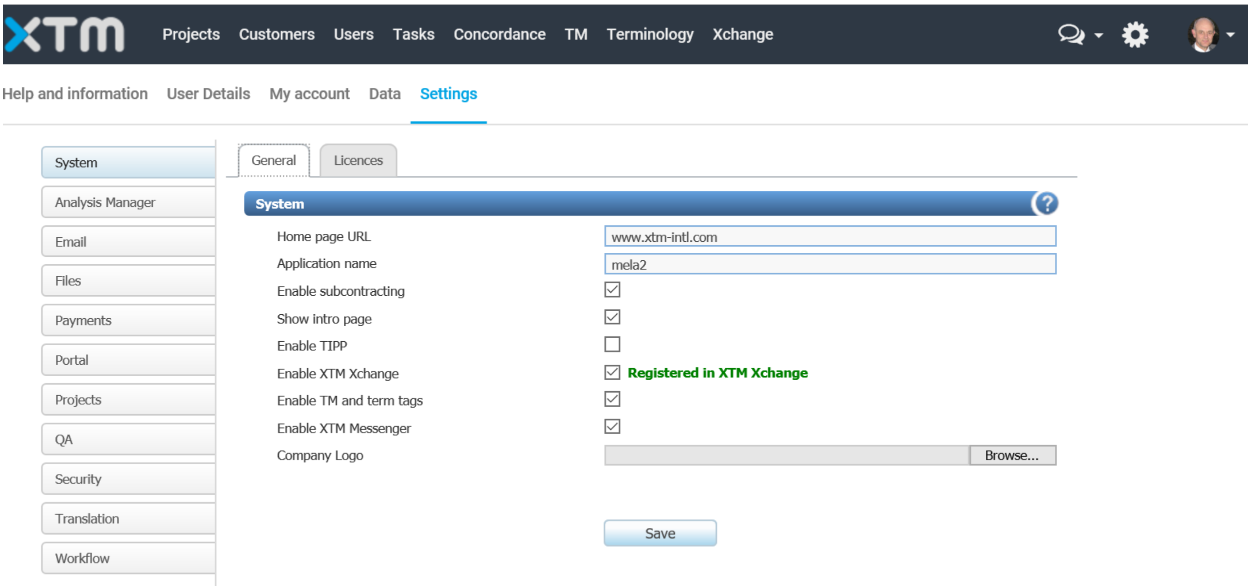
Many of the setting in XTM can be configured at the system level and then adjusted as required at the customer and project level.

Settings - System

General

The details displayed on the System - General tab are used to:

- Set links in XTM to connect to your website home page
- Set the application name in email messages
- Enable the subcontracting feature
- Switch on or off the XTM introduction page for all users
- Switch on the ability to download and upload TIPP files
- Use and register in XTM Xchange
- Use TM and term tags
- Upload your company logo to replace XTM on the login page and in the header of each page in the top left hand corner. Your logo should be in a .png, .jpeg, .jpg, or .gif format and will be automatically resized to 120 x 50 pixels



Settings – System – General tab

Licences

When working on tasks that you assign them, a subcontractor LSP may:

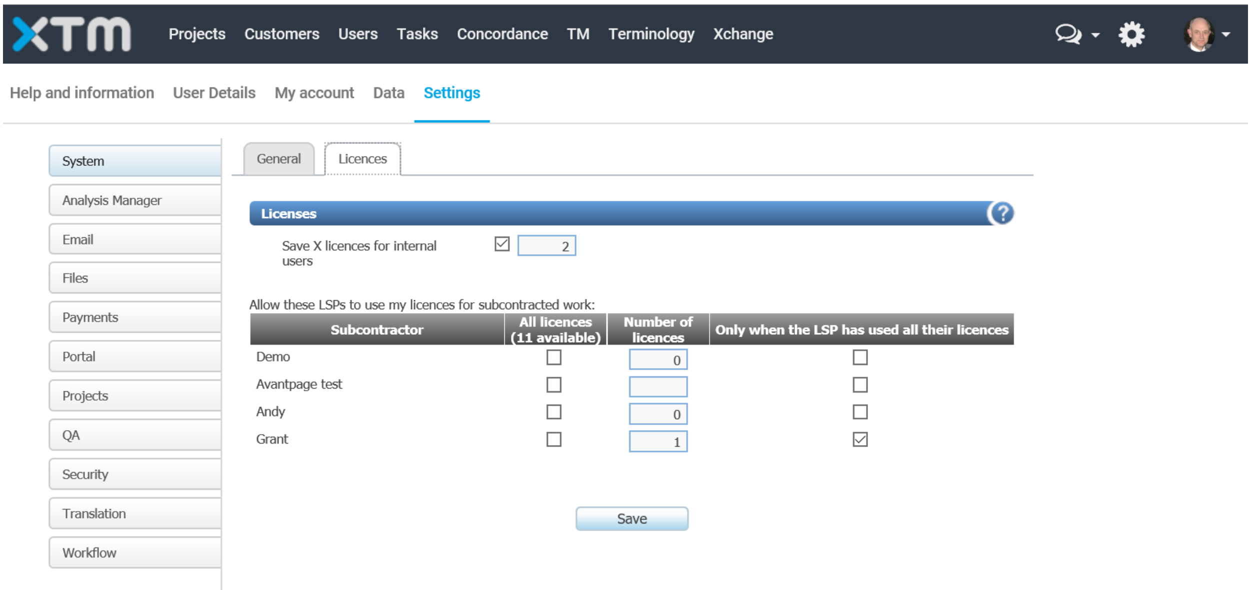
- Have purchased an XTM subscription and use their own licences.
- Have signed up for a free account and use your licences.
- Use a combination of their own licences and your licences.

In this tab you can determine how many of your licences a subcontractor LSP may use.

At the top of the screen you can reserve a number of licences for your own users.

In the table below there is a list of all your LSP subcontractors. You can specify that the LSP:

- Can use all your available licences
- Can use up to a stated number of licences
- Must use their own licences before using your licences



Settings – System – Licences tab

Settings - Analysis manager

The analysis manager allows you to customise the way XTM processes different file types in different languages. Modifying these rules is a highly technical task and should only be tackled by users with Advanced XML skills and knowledge of SRX and ITS rules. There are two sections:

1) Segmentation, where you can view, edit and define new SRX rules
2) Content, where you can view, edit and define new ITS rules.

Both types of rules can be system wide or specific to a customer. You can download an existing rule, modify it and then add a new rule based on this modified file.

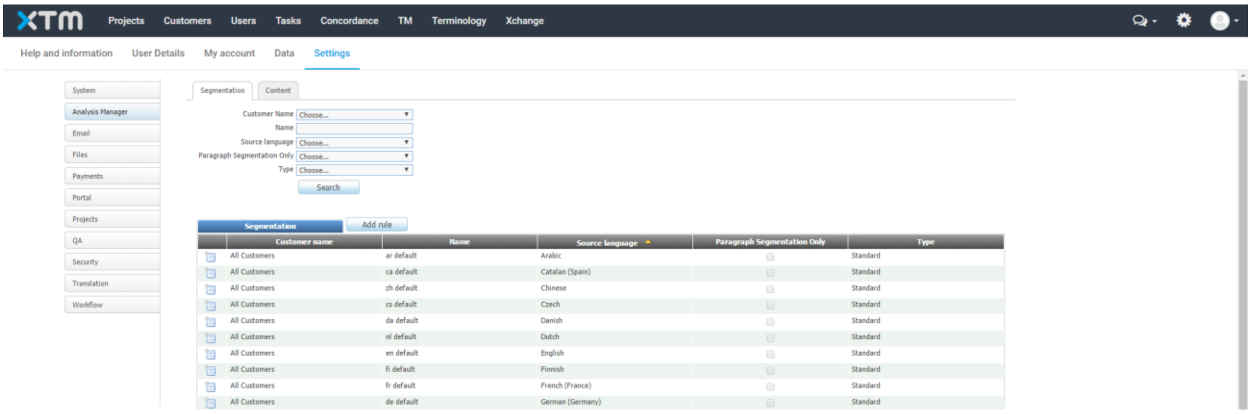
Segmentation

The segmentation tab displays a list of segmentation rules called SRX rules. You can use the search field at the top of the page to refine your search.

XTM supports three levels of SRX rules configuration.

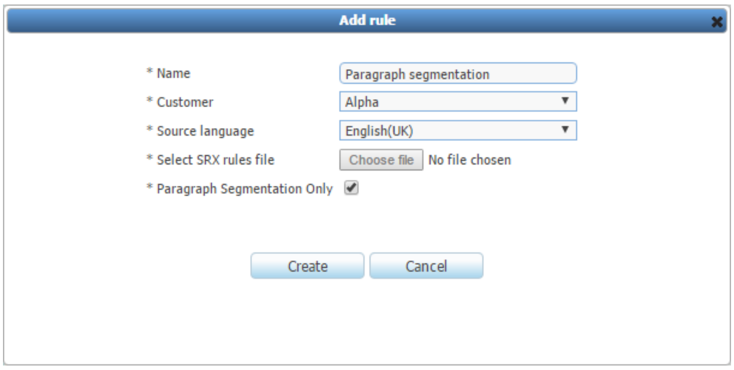
1. The default configuration provided with XTM.
2. A customised set of rules for your particular instance of XTM (system default)
3. A customised set of rules for individual customers

You can use the search field at the top of the Segmentation page to find one or more rules or to refine your search. You can edit, download or delete rules either by clicking on the menu icon in the left hand column of the rules listing or simply clicking on the rule itself. Note however that only custom rules can be edited or deleted.



Server settings – Analysis manager – segmentation

To add a custom SRX rules file click on the “Add rule” button and a window appears where you can specify the rule name, customer and source language. You can then either upload a new or modified SRX rules file or simply check the paragraph segmentation only box. Finally click the create button.



Server settings – Analysis manager – Adding a new segmentation rule.

Content

The content section lists the ITS rules in the system. ITS rules are used to allow you to determine which part of the source file should be translated. XTM is provided with ITS rules for all the file formats supported by the system, however sometimes the translation process may require a specific configuration.

You can use the search field at the top of the Content page to find one or more rules or to refine your search. You can edit, download or delete rules either by clicking on the menu icon in the left hand column of the rules listing or simply clicking on the rule itself. Note however that only custom rules can be edited or deleted.

During file analysis in XTM, the extract module decides which ITS rule to apply by checking in order:

1. The file extension
2. If a known file extension is not found, then XTM assumes the file is an XML file
3. The root element name

XTM supports three levels of ITS rules configuration.

4. The default configuration provided with XTM.
5. A customised set of rules for your particular instance of XTM (system default)
6. A customised set of rules for individual customers

Based on these 3 levels the rules are applied in the following order.

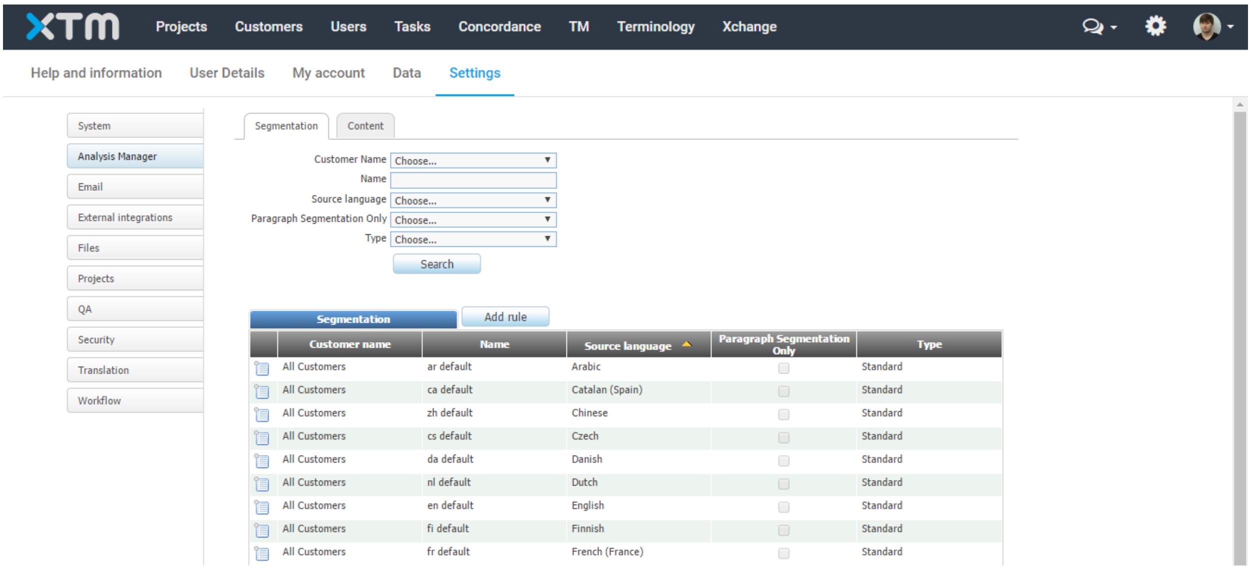
1. Initially XTM checks to see if there is an appropriate rule in the customer's configuration file.
2. If there is no rule for the customer's configuration XTM searches in the system's configuration.
3. If there is no rule for the system, XTM searches in the default configuration.
4. If there is no default configuration the system will automatically generate rules for a given file.

With each rule it is possible to define whether or not to use the HTML parser and whether or not to maintain white spaces in the file.

If the source file includes HTML and this can be an XML, Word, Excel or properties file, then you can use the HTML parser to extract translatable text from the HTML. Otherwise all the HTML will be taken for translation. If you want to embed HTML in XML, please remember to either wrap the HTML in a CDATA section or escape the HTML tags so as not to conflict with the XML tags.

If you want to maintain the white spaces and tabs exactly as in the source file, set this option to yes. If it is not, XTM will reduce any multiple white spaces that are together, to one space. Additionally, tabs will also be replaced to a single space.

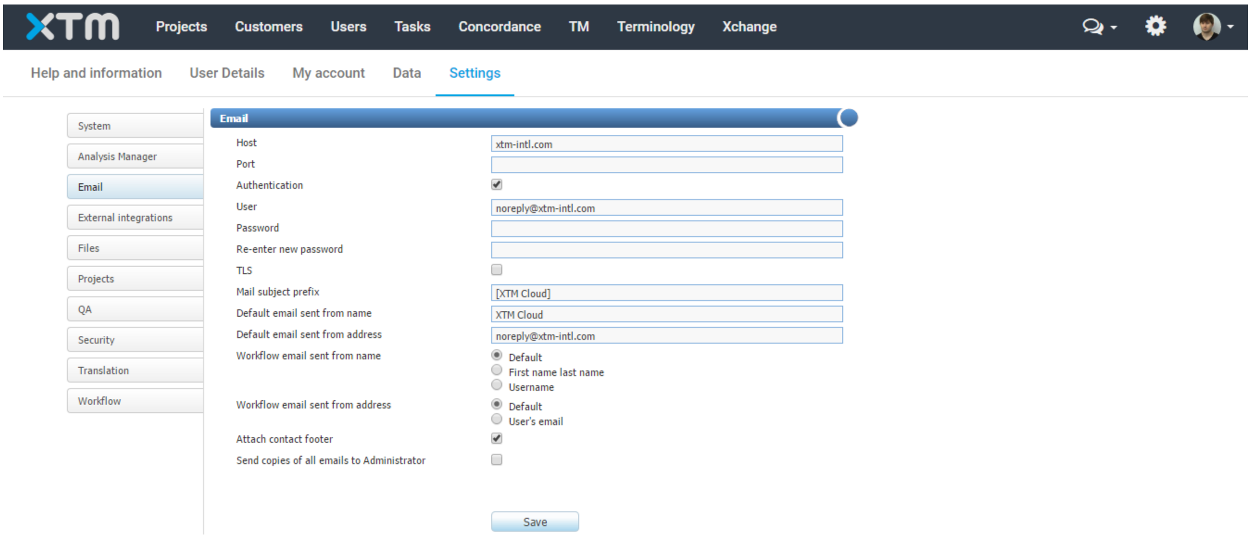
An example of an ITS rule is shown in Appendix 5 of this manual



Server settings – Analysis manager – content

Settings - Email

The e-mail settings allow you to configure an e-mail account to send e-mails from the system. By default, the XTM account is used. Unless you particularly want to change account we suggest that you leave the default settings.



Server settings – Email tab

The email settings are:

1) Host – This is the address of the email server. The XTM server is set by default. It does not require authentication because emails will be sent from XTM International's internal server. If you experience problems with spam messages, we recommend you set your own mail server.
2) Port – This is the port number to use during connections with the email server.
3) Authentication - If this option is checked then messages are sent from the email address (user, password will be checked). If not checked then messages are sent from the specified mail server without authentication.
4) User - This is the name of the email account which is used to send messages.
5) Password and re-enter new password - These fields allow you to change the password for the specified email account.
6) TLS - If this option is checked then the TLS protocol is used with SMTP host communication.

Points 7 - 10 describe the email formatting:

7) Mail subject prefix - Text entered here will prefix all email subjects. This may be useful to set up email filters.
8) Default email sent from – name – The sender's name will be displayed in the "From" field in the email as the email account name.
9) Default email sent from – address – The sender's email address that will be displayed in the "From" field in the email as the email account address.
10) Workflow emails sent from name – Select one of the 3 options. The default value entered above, the users first name and last name or the users Username
11) Workflow emails sent from address – Select one of the options. The default value entered above or the users email address.
12) Attach contact footer - If checked then footer will be attached to the email. The footer contains the information that message was automatically generated, can be ignored and website URL to see for more details.
13) Send copies of all emails to Administrator – check this box to activate.
14) Send workflow emails to linguists even when the project is not started – notify linguists that they have been assigned to or unassigned from a project that has not been started.
15) Use due date of one workflow step as a start date of the next – specify due dates for workflow steps to indicate when next workflow steps will begin.

16) Sort tasks in linguist emails by – choose whether tasks should be sorted by file names or the task status in emails to linguists.
17) Show all assigned tasks in linguist email (not only changed) – activate this option to send notification emails to linguists that include all their assigned tasks.
18) Do not list unchanged jobs in linguist emails when project consists of more than – use this option to hide unchanged jobs from the list when the number of jobs to show in emails to linguists exceeds the number selected from the dropdown list.
19) Show all jobs in PM email (not only changed) – activate this option to send notification emails to project managers that include all project tasks in their management.
20) Do not list unchanged jobs in pm emails when project consists of more than – use this option to hide unchanged jobs from the list when the number of jobs to show in emails to project managers exceeds the number selected from the dropdown list.
21) Do not use PM notifications for limited PMs – activate this option to reduce the number of notification emails sent limited project managers.
22) Group tasks in emails to PMs by – choose whether tasks should be grouped by file names or languages in emails to project managers.

Customising emails

Company or application name

It is possible to replace the application name displayed in e-mail notifications (by default this is “XTM”) with the name of your company or your application, in Configuration tab > Settings > System: Application name

Specification of XTM Cloud e-mail notifications

E-mail notifications are constructed using html and contain two kinds of variable:

- Localization variables in uppercase: these are populated with text in the same language as the user interface. The remaining text of the e-mails can be changed directly in the template but the message is then not localized when users change their language preferences. In order to have a localized version of the customized text you need to prepare additional localization files for each language.
- Data variables in lowercase: these variables contain data such as projects names, file names, the list of files.

Customization of XTM e-mails performed by XTM Support

User interface

The XTM Support team can carry out advanced customization of XTM e-mails. They are customized by updating e-mail template files (html files with variables):

- XTM International can provide you with XTM Cloud e-mail notification templates.
- XTM International can upload your customized e-mail notification templates to the server.

Variables

E-mails can include the following additional variables:

1. Variables that display in the user interface and do not require calculation:
   - Project type: id, name, customer name, status, minimum/maximum workflow status, creator, pm, information about MT, payment status, confirmation status, final estimate prices, create date, due date, finished date, if subcontracted, number of translation files, number of reference material files, number of words, analysis/editor properties such as use not approved memory, not editable ICE matches, target length restrictions
   - User type: id, username, role, address details, personal details, last login date, last logout date, preferred language, time zone, currency, mother tongue
   - Tasks: grouped by type

2. Variables that require calculation, analysis or complex queries can also be implemented but require more time to prepare

None of the variable types is obligatory to use. You can decide to use only localization variables, only data variables, both of them or none.

Localization and changing of variable name

It is possible to change the name of the variables displayed within one language or to localize them into multiple languages.

Contact XTM support with a list of changes and/or translations which are organized as follows:

- A change within one language:
  English:
  <text id="PROJECT_DETAILS">Project details</text>

  English:
  <text id="PROJECT_DETAILS">Project information</text>

- Localization:
  English:
  <text id="PROJECT_DETAILS">Project details</text>

  Polish:
  <text id="PROJECT_DETAILS">Szczegóły projektu</text>

Localization of customized e-mail notification text

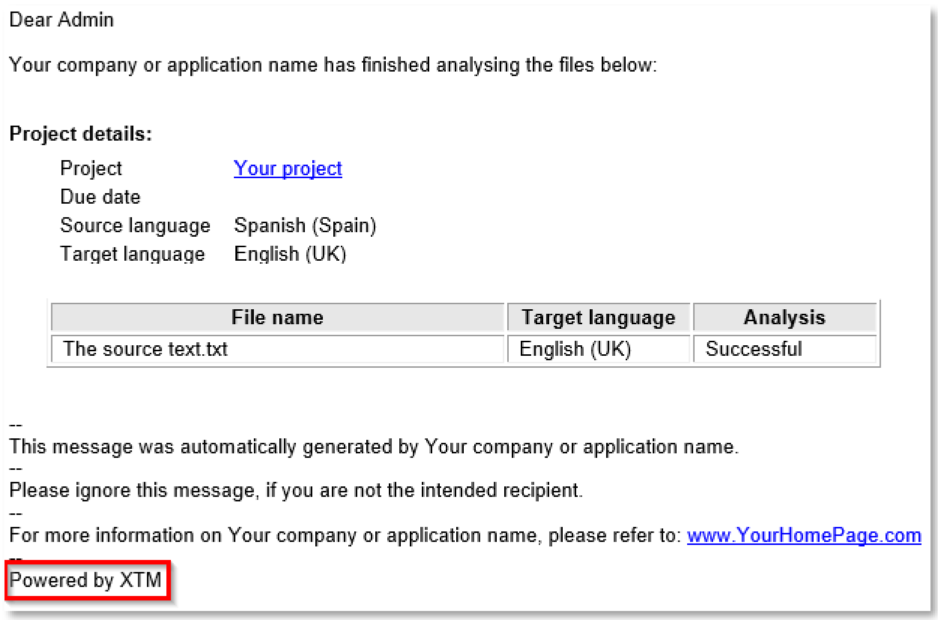
Localized e-mail notification template files can be manually placed in a directory structure of languages, such as English, German etc. Then, XTM Cloud will use the localized e-mail notification template files that match the user’s interface language preferences.

E-mail notification subject line

XTM International support can customize subject lines of e-mail notifications in your localization files. Subject lines can include variables, such as a project name, full language names, language codes etc.

XTM visibility

If there is no word “XTM” in the e-mail notification text, the phrase “Powered by XTM” will be added automatically.



Dear Admin

Your company or application name has finished analysing the files below:

Project details:

Project	Your project
Due date	
Source language	Spanish (Spain)
Target language	English (UK)

File name	Target language	Analysis
The source text.txt	English (UK)	Successful

--
This message was automatically generated by Your company or application name.
--
Please ignore this message, if you are not the intended recipient.
--
For more information on Your company or application name, please refer to: www.YourHomePage.com
--
Powered by XTM

Powered by XTM added to an e-mail notification

Settings - Files

The files section allows you to set file download and upload options.

File upload

In this section you can enter your custom message to display when target files have been manually uploaded.

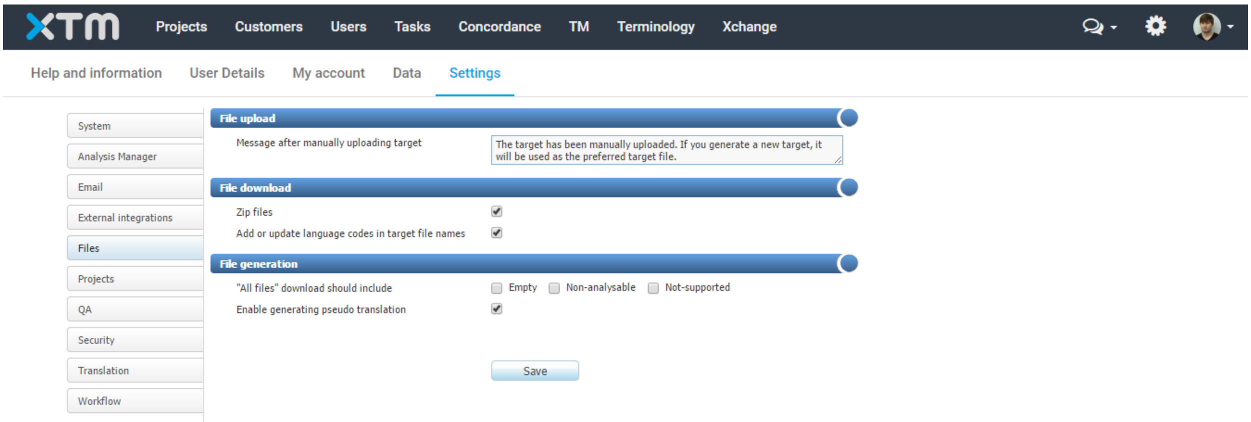
File download

1) Check Zip files to Zip any files before downloading.
2) Use add or update language codes in target file names to download files into target language folders with language codes in the file names.

File generation

The file generation section allows you to:

1) Choose which files should be included in the download “All files” option. You have the option of including empty, non-analysable and not-supported files.
2) Enable the generation of pseudo translation. This option allows you to download a file where all the text that has been extract for translation is replaced by an underscore. This allows you to see quickly if all the text has been extracted correctly, without actually doing any translation.
3)



Server settings – Files tab

Settings – LQA

LQA

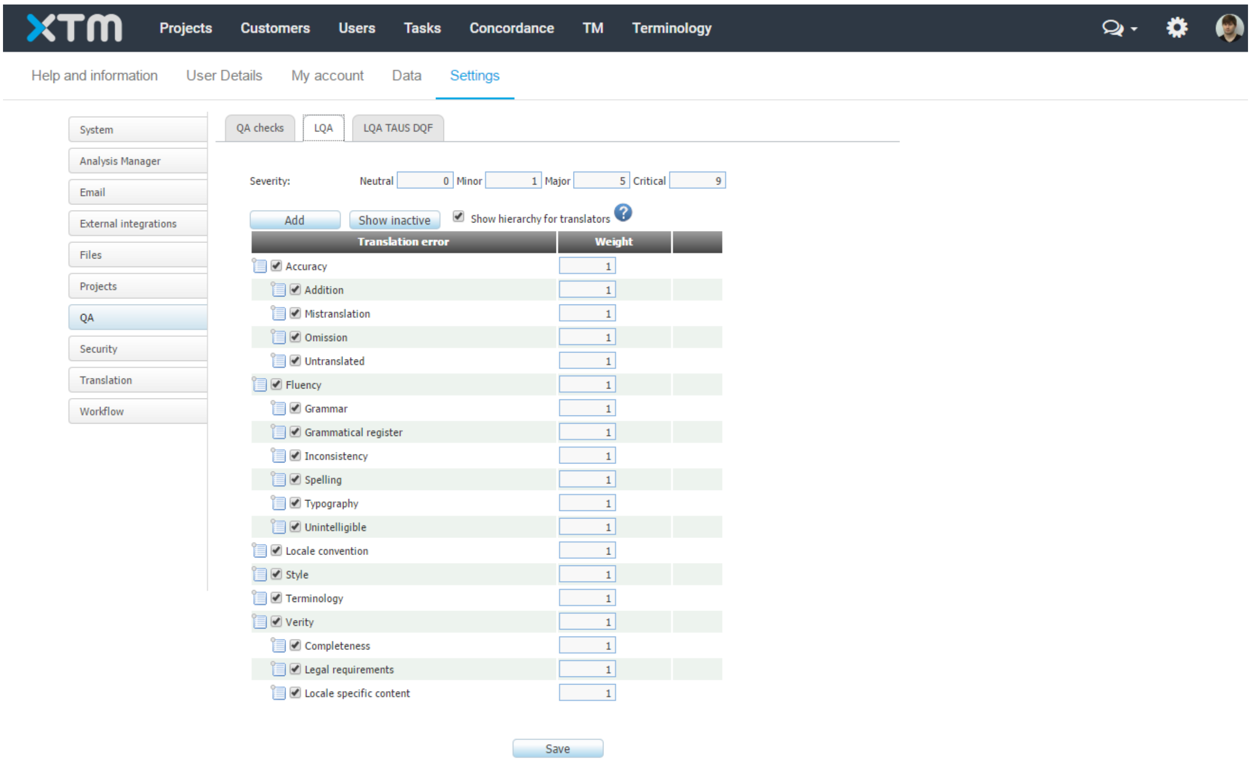
Overview

The LQA feature in XTM is a translation quality scoring system that is based on the Multidimensional Quality Metrics (MQM) model which has been designed as part of the QT Launchpad project. For more information about MQM see http://www.qt21.eu/launchpad/. The resultant system as implemented in XTM is

- Flexible – A scoring system that balances sophistication and simplicity
- Fair – When possible the cause of the problem can be identified
- Suitable for all translation methods – This includes MT
- Comparable: Results of different test can be compared
- Based on standards: MQM makes extensive use of ISO/TS 11669 as the basis for its dimensions
- Granular – Supports varying degrees of granularity

MQM provides a catalogue of over 120 issue types with definitions and examples. The hierarchy diagram of this issues is shown in Appendix 7.

In Configuration > Settings > QA > LQA you can select the full list of issues or any subset of them. You can also set the weight for each item and severity multiplier for minor, major and critical items.

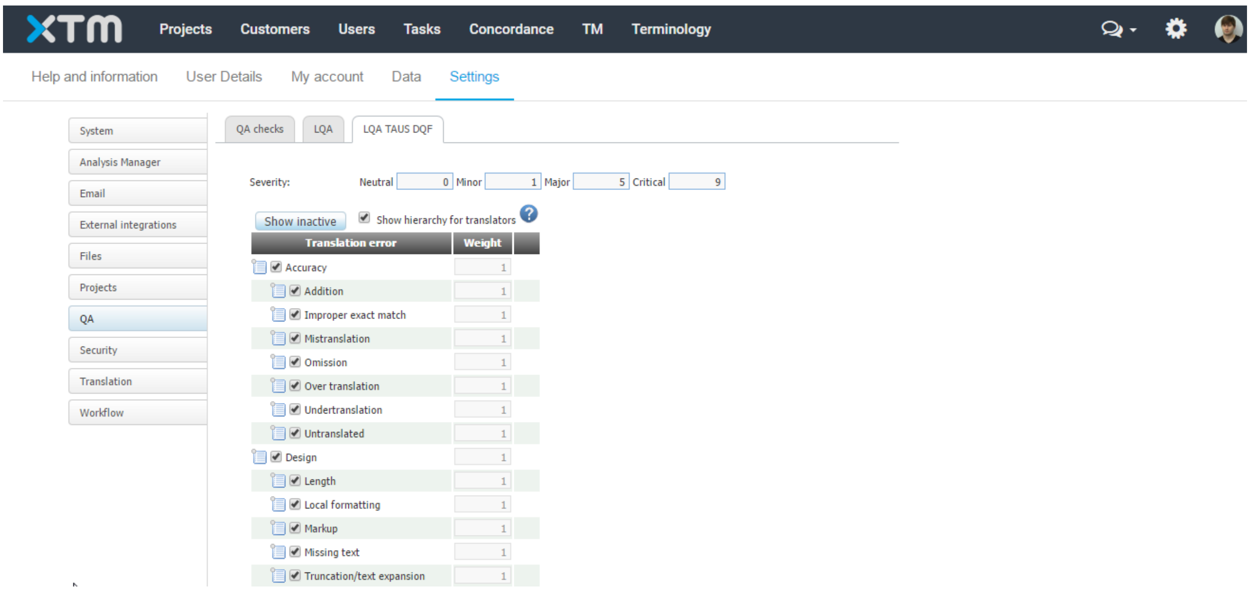


Configuring Issues for LQA

To change the name of the issue select details from the context menu. XTM will always retain the MQM name for reference.
You can also decide whether the issues are displayed in XTM Editor and the report as a flat list or arranged in a hierarchy.

LQA TAUS DQF

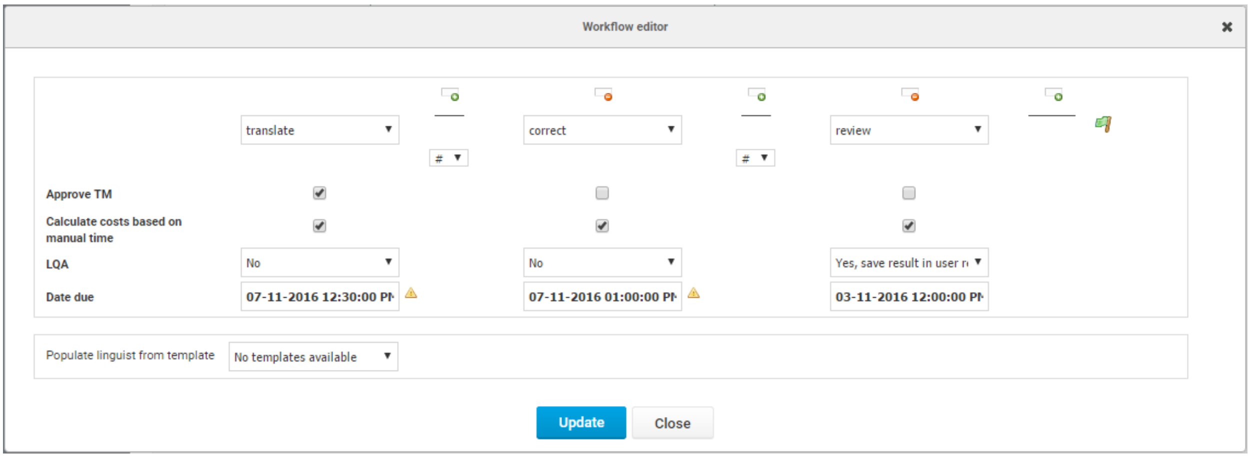
The LQA TAUS DQF error categories are based on the TAUS DQF quality settings When a connection with TAUS DQF is enabled for a project, the LQA TAUS DQF error severity matrix is used instead of the standard LQA error severity matrix.



Configuring Issues for LQA TAUS DQF

LQA Steps

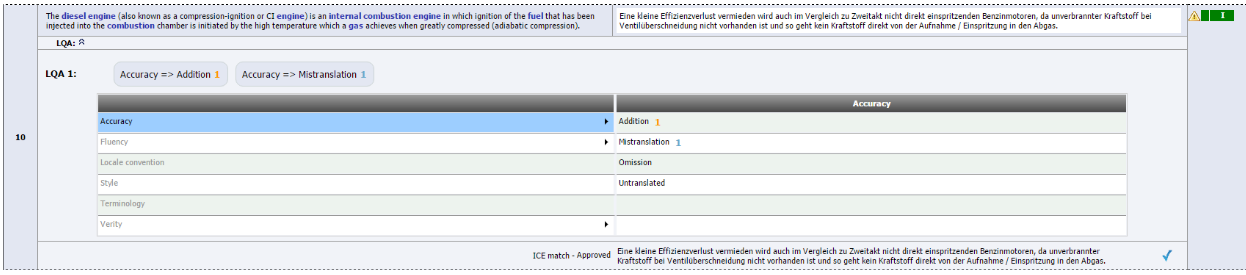
There is a default LQA step available for use in the workflow. Additionally, the LQA can be made available in any step in the workflow by checking a box in the workflow editor.



Workflow editor with LQA set for the correct step

LQA in XTM Editor

When LQA has been activated in a step, an LQA section appears underneath each segment in XTM Editor. The user performing the LQA can then easily select the error and choose a severity. The issue is then logged in the system and shows at the top of the LQA section, as a mouse over against the triangle in the status column and also in the LQA report.



Performing LQA in XTM Editor

LQA reports

The LQA reports can be downloaded from the context menu download item in Project listing or the reports item in the context menu on the files tab of the Project Editor.

	A	B	C	D	E	F	G	H	I
1	Severity multipliers								
2	Minor	1		LQA report	18-06-2014 17:20				
3	Major	5							
4	Critical	9							
5									
6	**Project**	Dell laptops 7			Word count	491	Total	6%	
7			Target text issues						
8	Issue type	Weight	Issue counts			Penalty		Target subscore	
9			Minor	Major	Critical	Raw	Adj.		
10	TOTAL	1	0	4	1	29	29	6%	
11	Completeness	1	0	2	0	10	10	2%	
12	Fluency	1	0	1	0	5	5	1%	
13	Grammar	1	0	1	0	5	5	1%	
14	Locale violation	1	0	0	1	9	9	2%	
15									
16	**Language**	English (UK)			Word count	491	Total	6%	
17			Target text issues						
18	Issue type	Weight	Issue counts			Penalty		Target subscore	
19			Minor	Major	Critical	Raw	Adj.		
20	TOTAL	1	0	4	1	29	29	6%	
21	Completeness	1	0	2	0	10	10	2%	
22	Fluency	1	0	1	0	5	5	1%	
23	Grammar	1	0	1	0	5	5	1%	
24	Locale violation	1	0	0	1	9	9	2%	
25									

LQA report for non-hierarchical issues

	A	B	C	D	E	F	G	H	I
1	Severity multipliers								
2	Minor	1		LQA report	18-06-2014 17:23				
3	Major	5							
4	Critical	9							
5									
6	**Project**	Dell laptops 1			Word count	491	Total	5%	
7			Target text issues						
8	Issue type	Weight	Issue counts			Penalty		Target subscore	
9			Minor	Major	Critical	Raw	Adj.		
10	TOTAL	1	1	3	1	25	25	5%	
11	Accuracy	1	1	3	0	16	16	3%	
12	General	1	0	1	0	5	5	1%	
13	Mistranslation	1	0	2	0	10	10	2%	
14	Terminology	1	0	2	0	10	10	2%	
15	General	1	0	2	0	10	10	2%	
16	Omission	1	1	0	0	1	1	0%	
17	General	1	1	0	0	1	1	0%	
18	Fluency	1	0	0	1	9	9	2%	
19	Mechanical	1	0	0	1	9	9	2%	
20	Spelling	1	0	0	1	9	9	2%	
21	General	1	0	0	1	9	9	2%	
22									
23	**Language**	English (UK)			Word count	491	Total	5%	
24			Target text issues						
25	Issue type	Weight	Issue counts			Penalty		Target subscore	
26			Minor	Major	Critical	Raw	Adj.		
27	TOTAL	1	1	3	1	25	25	5%	
28	Accuracy	1	1	3	0	16	16	3%	
29	General	1	0	1	0	5	5	1%	
30	Mistranslation	1	0	2	0	10	10	2%	
31	Terminology	1	0	2	0	10	10	2%	
32	General	1	0	2	0	10	10	2%	
33	Omission	1	1	0	0	1	1	0%	
34	General	1	1	0	0	1	1	0%	
35	Fluency	1	0	0	1	9	9	2%	
36	Mechanical	1	0	0	1	9	9	2%	
37	Spelling	1	0	0	1	9	9	2%	
38	General	1	0	0	1	9	9	2%	
39									

LQA report for hierarchical issues

If a hierarchical view is used, then the report will show the number of issues against the lowest level and all items in the tree or if entered against a higher level then it will be shown against a “general” item.

The Penalty score P is calculated according to this formula:
$P = (Issues_{minor} \times Minor\ multiplier + Issues_{major} \times Major\ multiplier + Issues_{critical} \times Critical\ multiplier)$

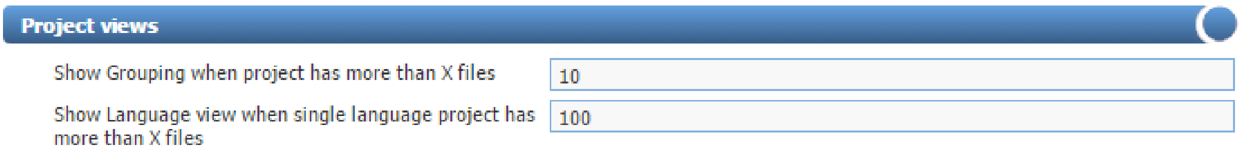
The Adjusted Penalty score A P is calculated according to this formula:
AP = P × Issue Type Weight

The Total score TS is calculated according to this formula:
TS = AP x100 / Word count

Settings - Projects

Project views

If projects have many files it is often easier to manage them in groups rather than individually. XTM has a feature that allows you to group the files together easily. When the number of files exceeds a defined limit then the grouping tab automatically appears in the Project Editor. This limit is set by an administrator in Configuration -> Settings -> Projects



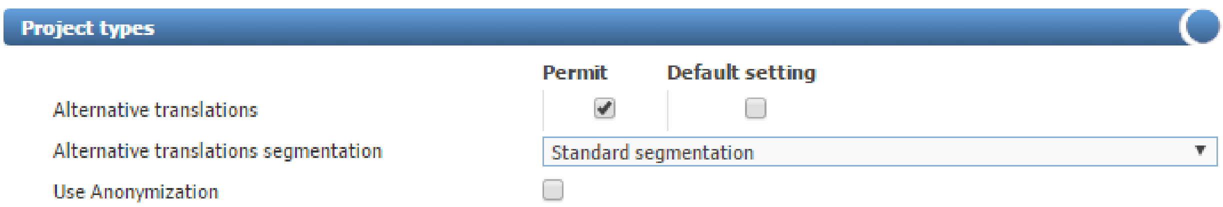
Configuration – Settings – Projects – Project views

Additionally, if you have a single language project with many files you can also manage the project at a language level rather than at a file level. The number of files in a project when this is visible is set in a similar way.

If you would like to manage the translation of non-analysable files in XTM then click the check box. This will allow you to set a special workflow for such files and allocate resources to the tasks.

Project types

In this section you can enable alternative translations and anonymization, and choose the segmentation method for projects with alternative translations.



Configuration – Settings – Projects – Project types

Alternative translations. This option is often used for transcreation projects and when activated changes the layout of XTM Editor to allow the translator to enter alternative translations and back translations.

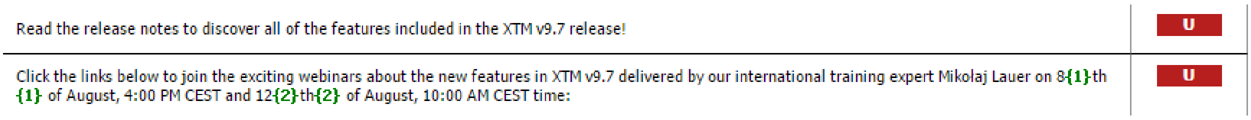
To activate alternative translations, check the boxes and enter the default number of alternatives. The settings entered here for the system can be modified for the customer and specific projects.

When this option is active, XTM displays each source segment the specified number of times in XTM Editor. There is a recommended translation followed by the set number of alternative translations, all of which can be completed by the translator. Each alternative translation has a field to enter a back translation. Additionally, the Alternative translation report can be generated and downloaded from Project Editor, Files tab, Previews. This gives an Excel file containing all the translations, back translations and comments on one sheet.

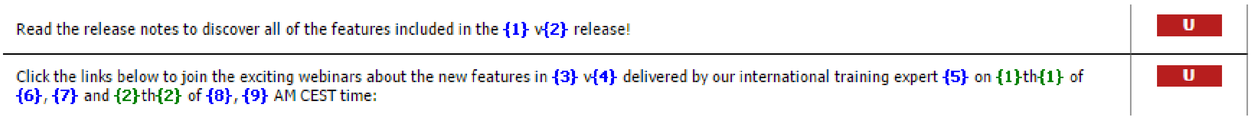
The comments section can be used as a place to enter the rationale for each translation. A reviewer may choose the desired alternative translation and copy it from the alternative to recommended translation. Only the recommended translation will be used to generate the target document.

Alternative translations segmentation. If the alternative translations option has been set, you can choose whether to segment the source text in paragraphs or using the standard segmentation rules for your system. The segmentation method will apply to all customers and projects when processing projects with alternative translations.

Anonymization. The anonymization feature identifies confidential personal data such as names, proper names, dates, addresses, telephone numbers, email addresses, URLs as well as any numeric values and replaces them with a placeholder. When the text goes for either manual translation, or machine translation, there is no risk that confidential information will be leaked. When the localization is complete, and the target document is recomposed, the confidential data is automatically reinserted into the text. This feature is currently available for English, French, German, Italian, Swedish, Danish, Dutch, Spanish, and Portuguese source texts.



Two segments without anonymization

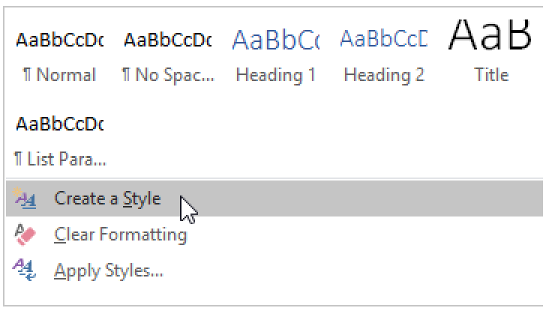


The same segments with anonymization

To activate anonymization in the system, check the box. By default, this will enable anonymization for all customers. You can disable anonymization for a specific customer, on the customer's Settings tab.

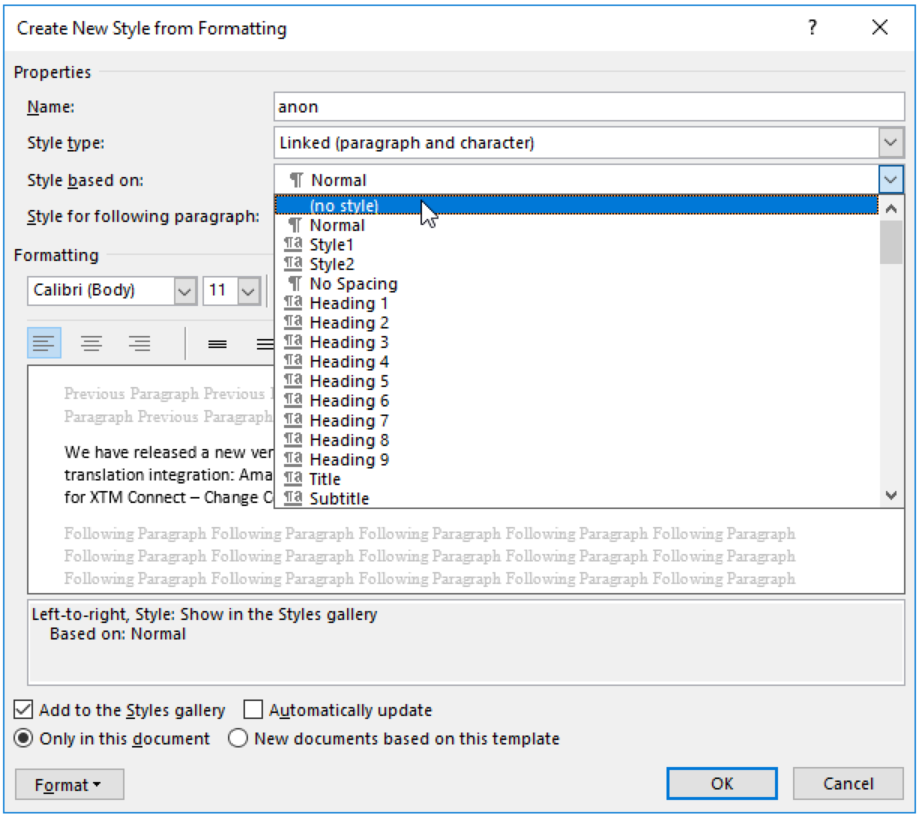
In addition to the standard anonymization functionality, you can manually select the text for anonymization in Word source files by applying a custom style. The name of the style has to begin with "anon" so that it can be recognized by the anonymization mechanism.

To create a new style in Word, expand the list of styles, and click Create a Style.



Creating a new style in Word

Enter "anon" as the name of the style or a name that begins with "anon". From the Style based on dropdown, select (no style). Save it, and apply to the text that you want to anonymize.



Setting up the anonymization style in Word

Joining files in sets

This section provides the configuration for joining files during project creation.

File join settings. Defines whether the file joining options are disabled, displayed in the simple or extended form. When file joining is enabled for a project, languages cannot be updated in the project.

Default value. This option sets the file joining option as activated or deactivated by default during project creation.

Join files by. When the extended interface is selected for the settings, it is possible to join files by:

- Extension: all files with the same extension are merged and displayed in the project as one.
- DITA Map level: files matching a specified DITA map level will be merged and displayed in the project as one. Files are joined only within a given substructure of the specified level which means there can be multiple resultant files of the same level. The number of resultant files matches the number of parallel substructures of the specified level. XTM recognizes the depth of DITA map structures based on <topichead> and <topicref> tags. Their presence is required for the DITA Map level files joining to work. The resultant files names inherit the structure name and names of files joined together.

Example 1
DITA map level 0 – all files will be merged into one
DITA map level 1 – files within each substructure of level 1 will be merged into one.
DITA map level 2 – files within each substructure of level 2 will be merged into one but files of substructure level 1 will not be merged.
DITA map level 3 – files within each substructure of level 3 will be merged into one but files of substructure levels 2 and 1 will not be merged.

Example 2
<topichead navtitle="b">

```
    <topichead navtitle="a">
        <topicref type="topic" id="a" href="topic/section/9.dita">
            <topicref navtitle="test section" type="topic" id="a" href="topic/section/10.dita">
                <topicref type="topic" id="4" href="topic/section/11.dita"/>
                <topicref type="topic" id="4" href="topic/section/12.dita"/>
            </topicref>
            <topicref type="topic" id="a" href="topic/section/13.dita"/>
        </topicref>
    </topichead>
    <topicref type="topic" id="a" href="topic/section/14.dita"/>
</topichead>
```

DITA Map level 0: one resultant file is generated from all files uploaded for translation
DITA Map level 1: one resultant file is generated from all files within group “b”
DITA Map level 2: all files from topichead “a” are merged into one file, file 14.dita remains separate
DITA Map level 3: all files from topcicref “a” are merged into one file, file 14.dita remains separate
DITA Map level 4: all files from topcicref “a” are merged into one file, files 13.dita and 14.dita remain separate

Monitor Customer Activity

This section is useful to monitor inactivity of regular customers. To configure this feature:

- Select the time at which XTM will monitor inactivity.
- Enter the time in hours that the customer should be inactive before you are alerted.
- Enter the PMs who should receive the alert email.
- Choose whether you want to monitor all customers or only selected customers. If this box is not checked then you need to go to the Customers tab, open the desired customer record, select the Settings tab and check the monitor inactivity box.

Due dates

This section allows you to manage the project due dates and the alert emails that are sent. An explanation of the fields is as follows:

Field	Description
Default due dates to X days ahead	Allows you to set the default number of days from the current day that XTM will use to calculate the due date. You will be able to edit this default value during project creation if necessary.
Default the due time to	Allows you to set the default time when the project is due. This value is added to the number of days that you have entered above. You have two options: 1) The time defaults to the current time plus a number of hours. 2) A specific time in the day.
Send due dates email to	Enables you to select who you want to receive emails that alert them to projects either approaching or past their due date.
Send due dates emails at	Allows you to set when you want the emails to be sent out. This can be done multiple times during the day.
Include projects that are due to expire in the next X days	Enables you to set which projects you want to include in the email depending on how soon they will expire.

Time tracking

This section gives you the option to control who can record the time taken on each step and how it is recorded.

- Enable manual time tracking for – Choose who can record the time spent working in XTM Editor
- Automatic time tracking – Check this box to track time automatically
- Enable rush job – Check this box to enable the use of rush job premiums
- Warn linguists if time not entered – If the time field is blank when finishing a task, display a window to enter a value

Integration with the TAUS DQF

You can configure XTM to connect with the TAUS DQF (Dynamic Quality Framework) to track translation productivity and quality. When a user creates a project in XTM that is configured to send data to TAUS, a new master project is created in the TAUS Quality Dashboard. During translation XTM sends translation units to TAUS. The units consist of the source, target and the edited translation text after the segment is confirmed by the user in XTM Editor.

Firstly, create an account with TAUS at www.taus.net. You can subscribe to the TAUS DQF straight from XTM. You can find the links under:

- Configuration > User Details
- Users > User editor > General

If you enabled TAUS before creating a TAUS account, you can access the data collected since then.

Configuration of TAUS account in XTM

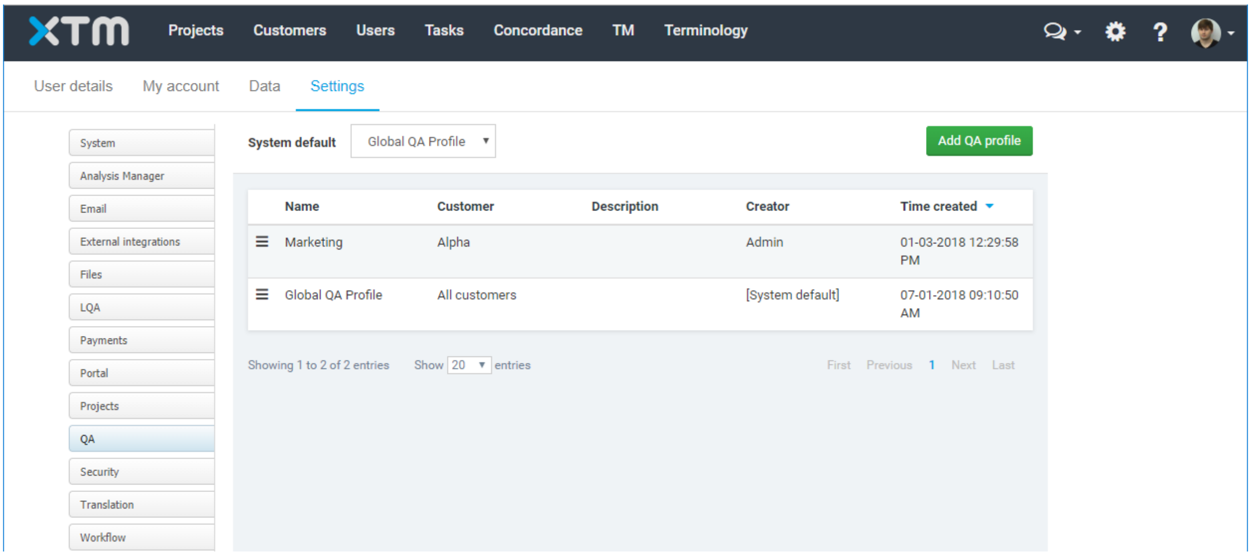
- Users can have their own TAUS accounts set up by Project Managers or Administrators on Edit User > General.
- Users can provide their individual TAUS account details in the User Details tab.

Settings - QA

QA profiles

The QA tab includes quality assurance settings that run automatically on the target text in XTM Editor. QA settings are arranged in QA profiles that you can select during project creation. By default, there is Global QA Profile applied to all projects, customers and languages.

You can create your own QA profiles when you need different settings for customers or different scenarios. Also, you can have different settings for languages of your choice in a single QA profile.



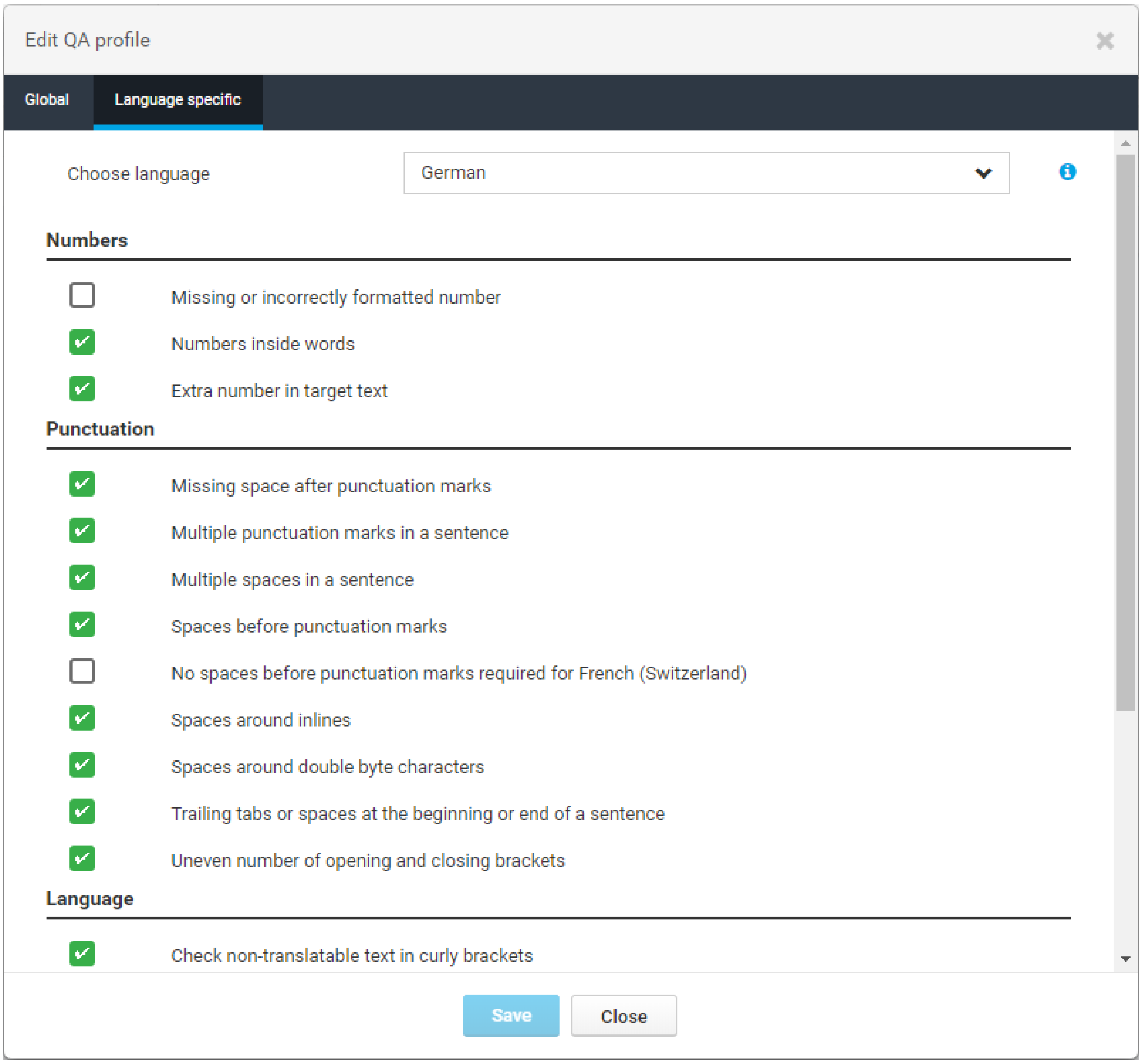
Configuration > Settings > QA screen

Language specific QA settings

To specify language specific settings:

1. Choose target languages on a profile's popup,
2. Go to the Language specific tab that just appeared next to the Global tab in the Edit QA profile window.
3. Choose a language from the dropdown.
4. Select the settings that will apply for the language.
5. Save.

XTM Editor will respect language specific QA configurations for selected languages. Global QA settings will be used for languages without a language specific setup.



Language specific settings in QA profiles

QA options

In QA profiles you can select the following checks:

Numbers
- Missing or incorrectly formatted number
- Numbers inside words
- Extra number in target text

Punctuation
- Missing space after punctuation marks
- Multiple punctuation marks in a sentence
- Multiple spaces in a sentence
- Spaces before punctuation marks
- No spaces before punctuation marks required for French (Switzerland)
- Spaces around inlines
- Spaces around double byte characters
- Trailing tabs or spaces at the beginning or end of a sentence
- Uneven number of opening and closing brackets

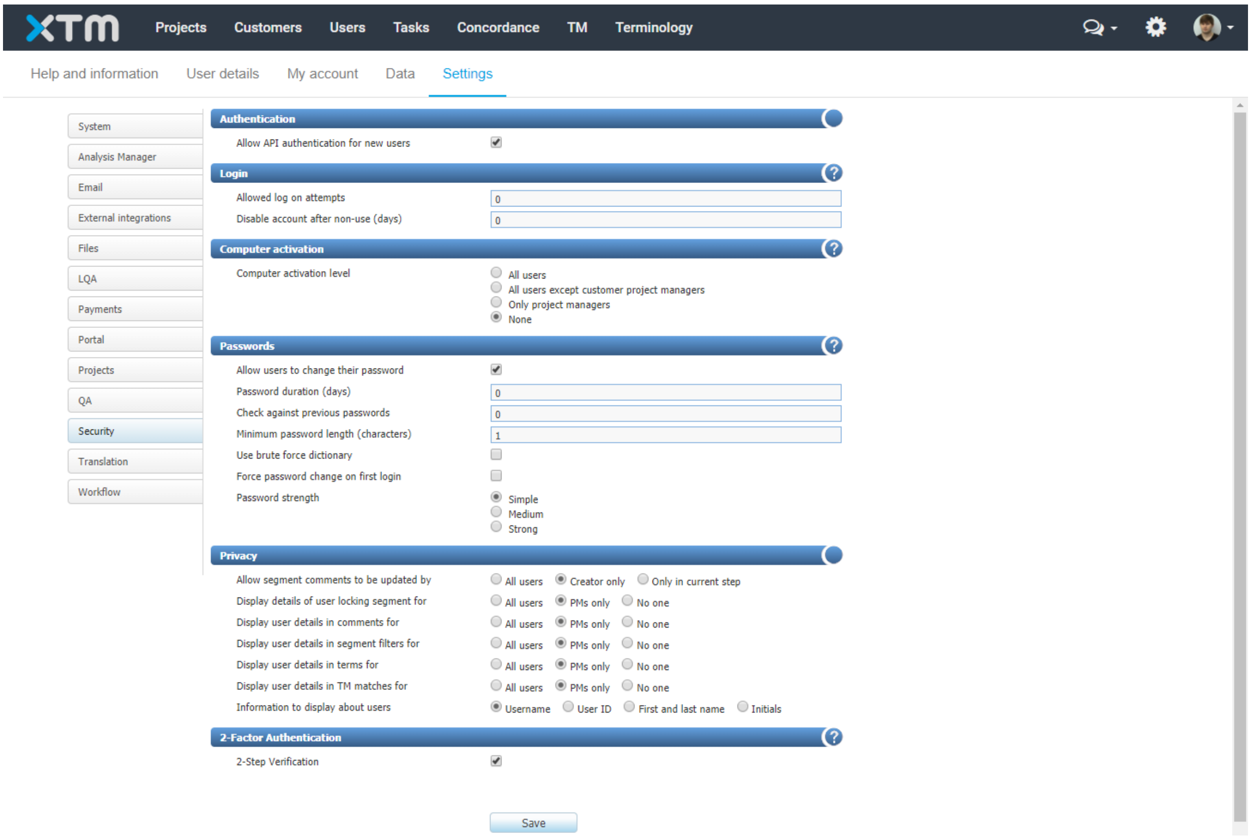
Language
- Check non-translatable text in curly brackets
- Forbidden characters
- Identical source and target
- Repeated words
- Spelling errors

Terminology
- Forbidden terms used
- Rejected terms used
- Translation of a term not found
- Translation of term does not exist in terminology

Settings - Security

XTM is an extremely secure environment. XTM Cloud uses an SSL certificate to ensure secure communications via HTTPS and we recommend the same for all XTM Suite installations as this not only improves security, but ensures compatibility when connecting different instances of XTM for subcontracting.

There are options that allow you to configure the security features in XTM to your own needs.



Configuration –Settings – Security tab

The security settings tab allows you to control the log on functionality in a corporate environment.

Feature	Description
Allowed log on attempts	If the user makes the number of invalid logon attempts specified, then their account will be locked and they will not be able to access the system. In order to unlock the account, the administrator needs to go to the Users tab and select unlock account form the menu icon in the left hand column of the users listing.
Disable account after non-use	If the user does not log into their account during the period of days specified, then the account will be locked. The account will then need to be unlocked by the administrator as described above.
Computer activation level	This setting specifies who will need to go through the PC activation process on first log in. The process involves generating an automatic email with a link to download a cookie.
Password duration	This field specifies the number of days that user passwords will be valid. After this period the user will have to change their password.
Check against previous passwords	This specifies the number of previous passwords that cannot be used as the current password.
Minimum password length.	This specifies the number of characters required in the password

Use brute force dictionary	This dictionary defines the words that cannot be used as or in a password. By default the following words and components are excluded: • User's first or last name • Administrator • Reviewer • User • Admin • Test • Super • qwe • 1111 • 111 • Password • Translator • XTM • Guest • Sys • Pass
Force password change at first log in	Check the box to enforce this measure
Password strength	There are 3 levels of password strength which define the mixture of characters in the password. Characters are split into 4 groups: • Upper-case letters, • Lower-case letters, • Numbers • Non-alphanumeric symbols. The password strength is thus: • Simple — Must use characters from at least 1 group. • Medium — Must use characters from at least 2 of the groups. • Strong — Must use characters from at least 3 of the groups.

Privacy

This section can be used to define who can update segment comments and also hide the names or details of other users of the system.

The list describes the various places that user information is displayed in XTM Editor. The areas are:

- Segment comments
- Additional information about the TM match
- Additional information about terms
- Who is locking a segment
- Segment filters

For each area there are three options:

- Everyone can see the user information
- Only project managers can see the information
- No one can see the information.

Information to display about users: This option allows you to decide what information should be visible. The options are Username, User ID, First name and last name, or initials.

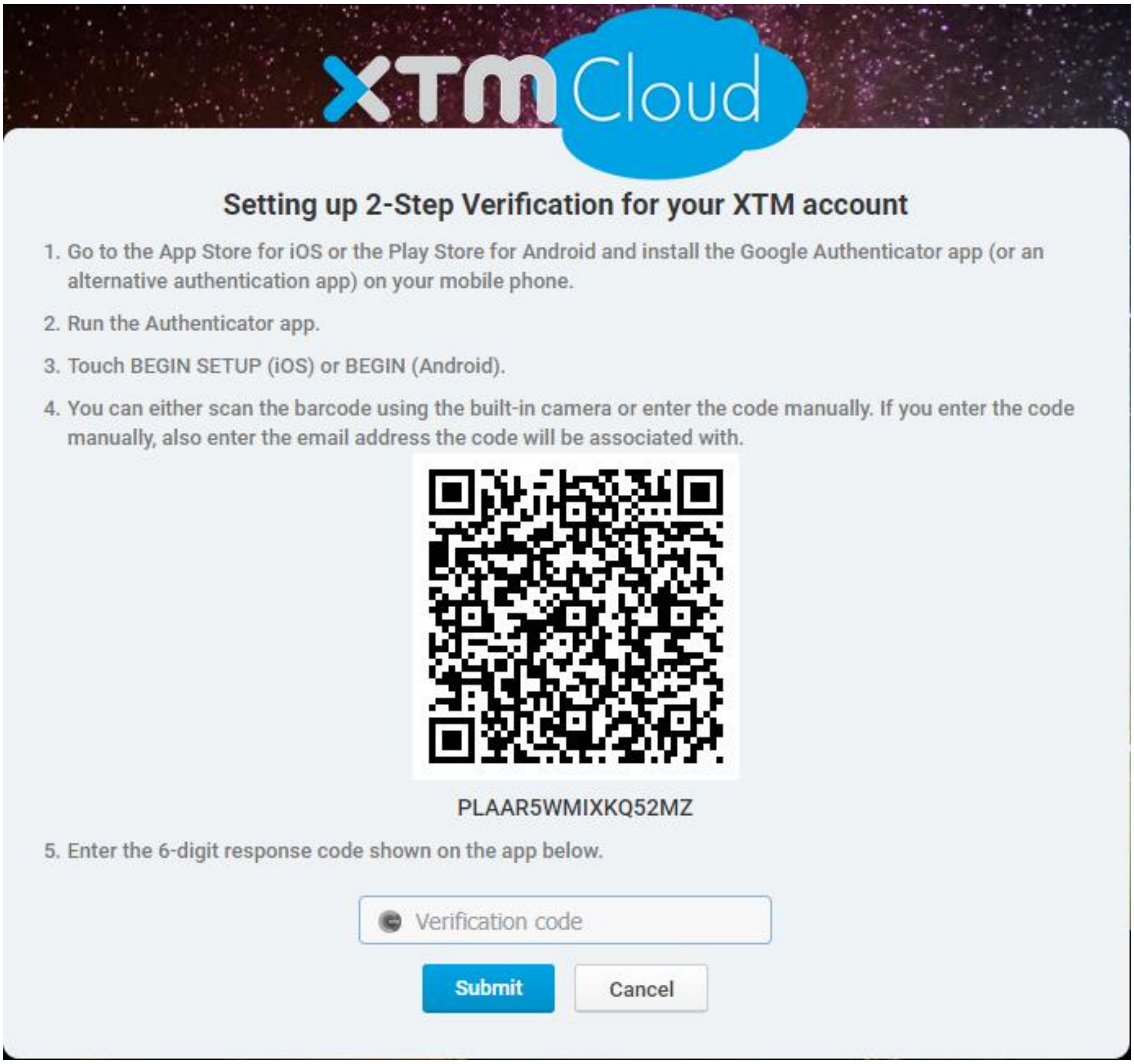
2-Factor Authentication

2-Step Verification

2-step verification is an optional login method to provide increased security. It changes the log in process so that you need your password and also a code that can be sent to your mobile phone via text, voice call or mobile app. More information about Google 2-Step Verifications is available here: https://www.google.com/landing/2step/.

Configuring 2-step verification on your account

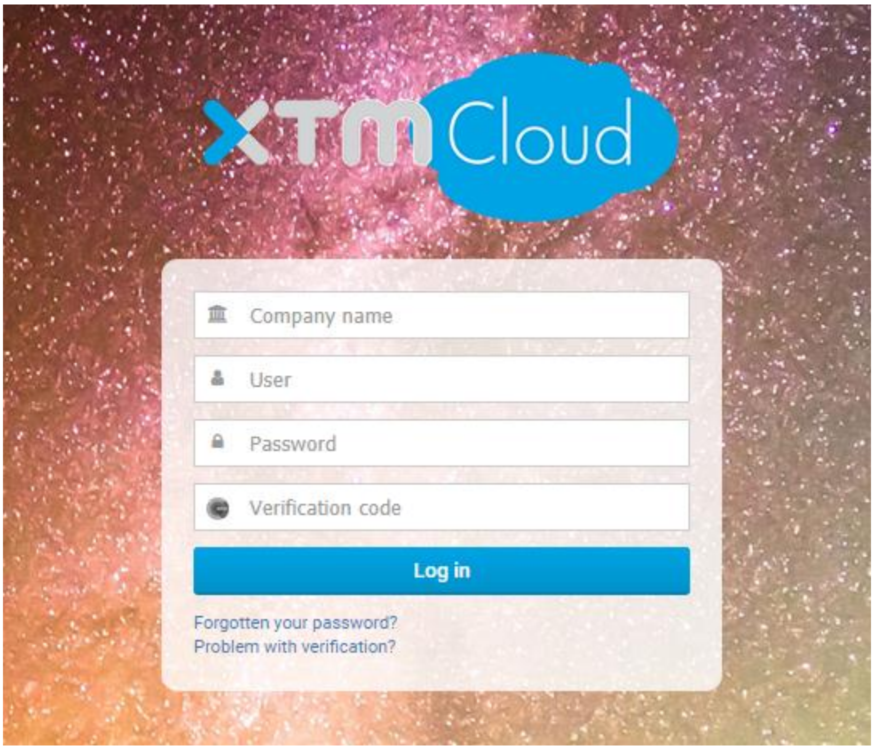
First, enable 2-step verification on the Configuration > Settings > Security. Log out from XTM. Try to log back into XTM. You will see the Setting up 2-Step Verification for your XTM account screen. Follow the on-screen instructions.



Logging in for the first time to XTM after enabling 2-step verification

You will be asked to install an authenticator app for your mobile device. Download the app, run it and follow the in-app instructions to set it up. The app will display a verification code for you. Enter the code into the verification field and click Submit. You will be logged in to XTM.

The next time you log in to XTM, the login form will include the verification code field for you to enter it together with the rest of the credentials.



Logging in to XTM when 2-step verification is enabled

Single Sign-On (SSO) using OAuth 2.0 or SAML 2.0

The single sign-on login method leverages a third-party authentication service to confirm the user's identity before they attempt to log in to the service they want to use. By authenticating users before they access XTM, they are not asked for credentials when opening XTM.

SSO can be set up with a number of different providers using OAuth 2.0, e.g. Google or Facebook, or SAML 2.0, e.g. Google or Ping Identity. The feature cannot be enabled in the user interface. In order to activate it, please contact XTM Support.

Settings - Translation

ID based matching

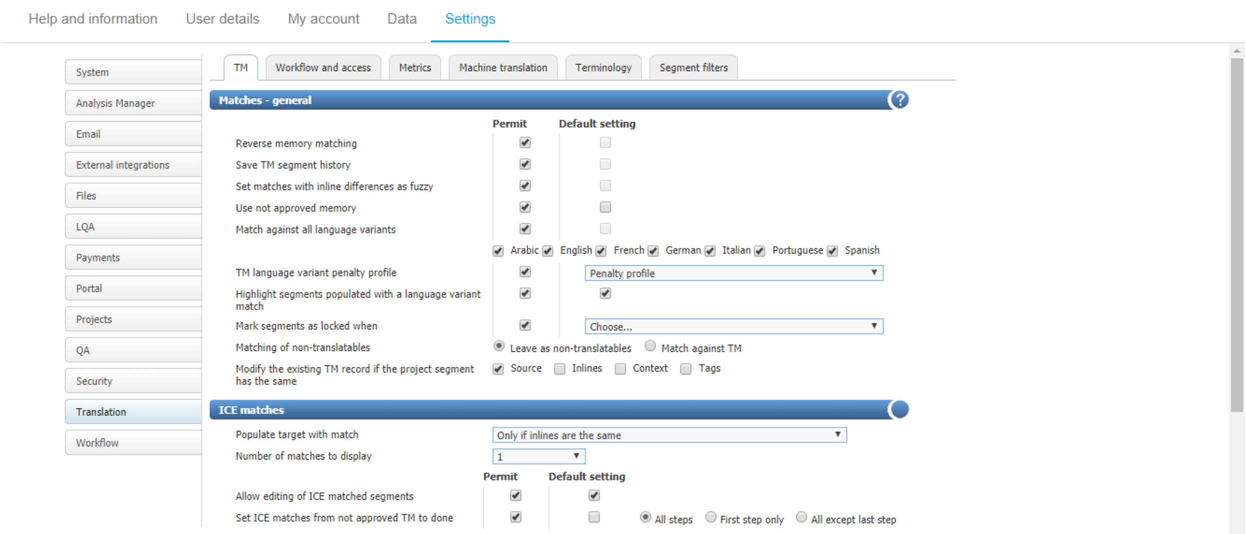
If your source files are XML, YAML, properties files or Microsoft Excel and iterations of the same file are processed, then XTM can be configured to use ID based matching. This type of matching is particularly useful for translating software interface text or games, where context is not particularly relevant. It will result in improved matching because matches that were a leveraged match can be shown as an exact ID match.

ID based matching works for source documents that contain an ID next to the text. So in an XML file the ID could be an attribute next to source text, another element or the ID can be composed from an XML hierarchy such as package name and string key. For an Excel file the segment ID will be in a separate column.

When the segment is stored in the TM, it is saved with the segment ID, so that when the document is processed again, if XTM finds a 100% match and the IDs are the same, then this match is treated as an ICE match. In this way XTM does not use the context of the string to determine an ICE match.

The configuration of XTM for ID based matching is a one-time process. XTM International can create a configuration for ID based matching for a file type, customer and for XML files the root element name. If you wish to use ID based matching, please send a sample file highlighting what IDs to use to support@xtm-intl.com.

Translation – TM



Configuration – Settings – Translation – TM tab

Matches – general options

- Reverse memory matching. Checking this option will enable XTM to use a TM that is stored in the reverse direction to the project. For example, if the project is English to French then XTM will firstly match against this TM and then against the French to English TM. Reverse translation memory matching only occurs where no match was found for the segment in the standard TM.

  In XTM the translation memory is stored as a source and target language pair in a database. There is one table in the database for each target language, where all the segments for that target language are stored, whatever the source language.

  The process of reverse matching is:
  - First of all, XTM looks in the regular table for the project target language and seeks a match for the source text.
  - If any kind of match is found XTM uses it and does not look for a reverse match
  - If no match is found, XTM tries to find a reverse match by looking in the TM table of the project source language.
  - If matches are found in this table XTM only returns matches for the correct language pair

  Reverse matching will give you ICE, leverage and fuzzy matches. However, note that the context of the match which is used for ICE matches is only saved in the TM at the end of the workflow. So you will only get ICE matches from previous projects if they have finished. Currently reverse matching is enabled or disabled for the whole system and so either used or not used on all projects.

- Save TM segment history: If checked XTM will save all versions of the TM segment. The history is visible in the TM manager by clicking on the i icon next to the segment and then the clock icon in the pop up.

- Set matches with inline differences as fuzzy: If the only difference in the match is inline elements then this option allows you to set the match as a 100%/ICE match or as a 99% fuzzy match.

- Use not approved memory: Translation memory is created and stored immediately in XTM when the translator changes the target text and moves to the next segment. Initially it is stored as “not approved” but this is changed to “approved” when the job is completed. This option allows you to choose whether you wish to use “approved” or “not approved” TM.

- Match against all language variants. This item gives you the option to match using all language variants. For example, when this option is checked if you are translating English to Spanish (en-GB to sp-SP), XTM will firstly match against the English en-GB to Spanish sp-SP TM and then check all the other variants of English such as en-US or en-AU and Spanish such as sp-MX or sp-CL TM to find a match. When you check the permit box you have the option to specify which languages you want to include. The options are Arabic, English, French, German, Italian, Portuguese and Spanish.

- TM language variant penalty profile. You can specify which penalty profile to use for language variant matches. The option will only work when the following conditions are met:

    - The Match against all language variants option is enabled
    - At least one TM penalty profile exists with the Match type is the variant option set in the Field column under Configuration > Data > Tags > Penalty profiles
    - A match is applied from a translation memory that is a different variant of the target language

- Highlight segments populated with a language variant match. When matching against all language variants is enabled, the segment number field of language variant matches written to target is displayed in orange.

Segment highlight when populated with a language variant match

- Mark segments as locked when. You can choose one of the options below to lock specific types of segments:
    - Match type is approved or not approved ICE and Leveraged. Segments populated with either approved or not approved In-Context Exact matches and Leveraged matches will be locked.
    - Match type is approved ICE and Leveraged. Only segments populated with approved In-Context Exact matches and Leveraged matches will be locked.
    - Xliff:doc status >= Translated. Segments with Translated, Proofed and Validated Xliff:doc statuses will be locked.
    - Xliff:doc status >= Proofed. Segments with Proofed and Validated Xliff:doc statuses will be locked.
    - Xliff:doc status = Validated. Only segments with the Validated segment status will be locked.

- Matching of non-translatables. Non-translatables are segments that are numeric text, alpha numeric text or contain only punctuation. This option allows you to decide whether to leave the non-translatable text unchanged or to match it against the TM.

- Modify the existing TM: By default XTM will create a new TM record if you modify the match provided in any way. This option allows you to manage duplicate entries so that the existing TM record is updated if the current segment has the same source text, the same inlines, context or tags.

  The following is an explanation of how XTM handles duplicate entries in the TM.

  Imagine the situation where you translate one project and then create a second project using the same file. In the second project you have the same source sentence in the same context, but you translate it differently. By default a new TM entry is created and the data from the second project, such as tags, is included.

If however you do not touch the target and you just accept the segment, this forces a TM update - this situation can occur if there are no green ICE matches because they were set to orange for not approved memory. In this case XTM updates the date of the existing TM and also consolidates tags by adding all new tags to the existing memory.

Consolidating tags can also happen if you import memory with different tags. Let's say the first TM file has the tag “tag1” and the second “tag2”. After importing both files all similar segments will have both tags.

In the Configuration section it is possible to determine what should happen if the translation from the second project is different from the existing TM. We can control if a duplicate TM entry is created or the old record is overwritten, thus having only one translation in the TM and no duplicate for a given source and probably context.

The follow examples demonstrate how XTM handles duplicate TM entries:

Example 1
Our source file is:

First	sentence.
Second	{1}sentence{1}. (sentence is bold)
Third	sentence.

The second sentence is translated into "Drugie {1}zdanie{1}" - the other translations are not important.

The settings for TM duplicates is:
Modify existing TM if source, context and inlines are the same.
If we translate the second sentence differently in our second project it will overwrite our existing translation.

Example 2
If we now modify the settings so that they are less strict.
Modify existing TM if source, inlines are the same.

Assume our source file is now:

Second	{1}sentence{1}.
Third	sentence.

So we removed the first sentence and created a third project using this file.

When making amendments in our newest project we will overwrite our one and only translation changing the context of the TM. This can have serious repercussions because if we create another project using the first file we will not get an ICE matches. So this option should be used with care.

Example 3
Even with greater care should be taken when the inline restriction is lifted.
If we make a fourth project where the second sentence is no longer bold

Second	sentence. (without bold style)

When we edit the ICE match we will make changes to our one and only database translation. This is dangerous since the first file (with inlines) would have a lower match since the inlines are missing.

Tags setting for duplicates.

In the situation when an old project contains all the same tags as the new project (or does not have a tag group at all) the translation will be treated as duplicate.

Example 4

First project has the tags TM_Status: Working.
Second project has the tags TM_Status: Working.

Those are obviously duplicates.

Example 5
First project has the tags TM_Status: Working, Golden.
Second project has the tags TM_Status: Working

Those are duplicates as well.

Example 6
First project has the tags TM_Status: Working
Second project has the tags TM_Status: Working, Golden

Those are NOT duplicates. New segments will be created when making changes in second project

Example 7:
First project has the tags TM_Status: Working.
Second project has the tags TM_Status: Working; Year: 2014

If the tag group is not defined in the first project then it is ignored in the second project. Thus in this case only TM Status: tags are used.

Exact tags option

There is a further option with tags that simplifies the above cases. It is called "Identical tags only"

If this option is checked the TM will only be updated if all tag groups and tags are exactly the same in the first and second project.

- Mark segments as locked when: Allows you to lock the segment in XTM Editor depending on the match type, the match approval status and the XLIFF:doc status. There are 2 standard options to select:
  - When the match type is approved or not approved ICE and leveraged
  - Match type is approved ICE and leveraged

  There are 3 additional options if TIPP is switched on under Configuration -> Settings -> System
  - XLIFF:doc status is >= Translated
  - XLIFF:doc status is >= Proofed
  - XLIFF:doc status is >= Validated

  When a segment is locked using this method it is greyed out and a key icon appears in the status column. In this state clicking on the target text does not make the cell active. Clicking on the key allows the user to unlock the segment.

ICE match options

- Populate target with match allows you to determine when the ICE match is automatically inserted. There are three options:
  - Always even if inlines are different
  - Only if inlines are the same
  - Never
- Number of matches to display: Enter the number of matches to display in the box.
- Allow editing of ICE matched segments: An In Context Exact (ICE) match should not need to

be reviewed or edited, however if this is not the case this option may be switched on here.
- Set ICE matches from not approved TM to done, allows you to set for which steps in the workflow, the status of segments with this kind of match, should be automatically set to done.

Leveraged match options

- Search only if there are no ICE matches: By default if there is an ICE XTM does not look for a leveraged match. You can change this behaviour by checking the box.
- Show leveraged matches: there are five options that determine if the match is shown to the translator:
  - Yes
  - Only if its approval status is higher that the ice of leveraged match
  - Only if its XLIFF:doc status is higher than the ICE or leveraged match
  - Only if its XTM and XLIFF:doc status is higher than the ICE or leveraged match
  - No
- Populate target with match: there are three options that determine if the leveraged match is automatically entered into the target:
  - Always even if inlines are different
  - Only if inlines are the same
  - Never
- Number of matches to display: Enter the number of matches to display in the box.
- Save context of leveraged matches in TM when automatically set to done: If you check this option, when a 100% leveraged match is automatically set to done, it will be saved with context information. The result of this is that in future projects, you should get an increased percentage of ICE matches.
- Set leveraged matches from approved TM to done: This option allows you to set for which steps in the workflow, the status of segments with this kind of match, should be automatically set to done. It is important to note that 100% leveraged matches with inline differences are not marked as done and remain orange.
- Set leveraged matches from not approved TM to done: As above but this relates to TM that has not been approved yet.

Fuzzy match options

- Search for fuzzy matches even if specific matches found: By default if there is an ICE or leveraged match XTM does not look for a fuzzy match. You can change this behaviour by checking the boxes – ICE or Leveraged in this option.
- Show: for each level of fuzzy match there are five options that determine if the match is shown to the translator:
  - Yes
  - Only if its approval status is higher than the ICE or leveraged match
  - Only if its XLIFF:doc status is higher than the ICE or leveraged match
  - Only if its XTM and XLIFF:doc status is higher than the ICE or leveraged match
  - No
- Populate target with: for each level of fuzzy match there are three options that determine if the fuzzy match is automatically entered into the target:
  - Always, fixing inline differences
  - Only if inlines are the same
  - Never
- Number of matches to display: Enter the number of matches to display in the box.
- If segment has one number, which is different, promote fuzzy match to leveraged & substitute number: If the only difference between the segment and the TM is a number then XTM can be set to insert the correct number upgrade the match to leveraged.

Repeats

- Allow hiding repeated segments: When this option is enabled, an option called Hide repeated segments is available during project creation. The option can be used to only translate the segment that contains the first occurrence, while the repeated segments are processed in the background. The feature is activated when the percentage of repetitions in a file exceeds the value set during project creation.

Fuzzy repeat options

- Search for fuzzy repeats even if specific matches found: By default, if there is an ICE or leveraged match XTM does not look for a fuzzy repeat. You can change this behaviour by checking the boxes – ICE and/or Leveraged in this option.
- Show: decide whether to show fuzzy repeats for each match level.
- Populate target with: for each level of fuzzy repeat there are three options that determine whether XTM should automatically enter the fuzzy repeat into the target:
  - Always, fixing inline differences
  - Only if inlines are the same
  - Never
- Number of repeats to display: Enter the number of repeats to display to linguists in the box.

Segment status

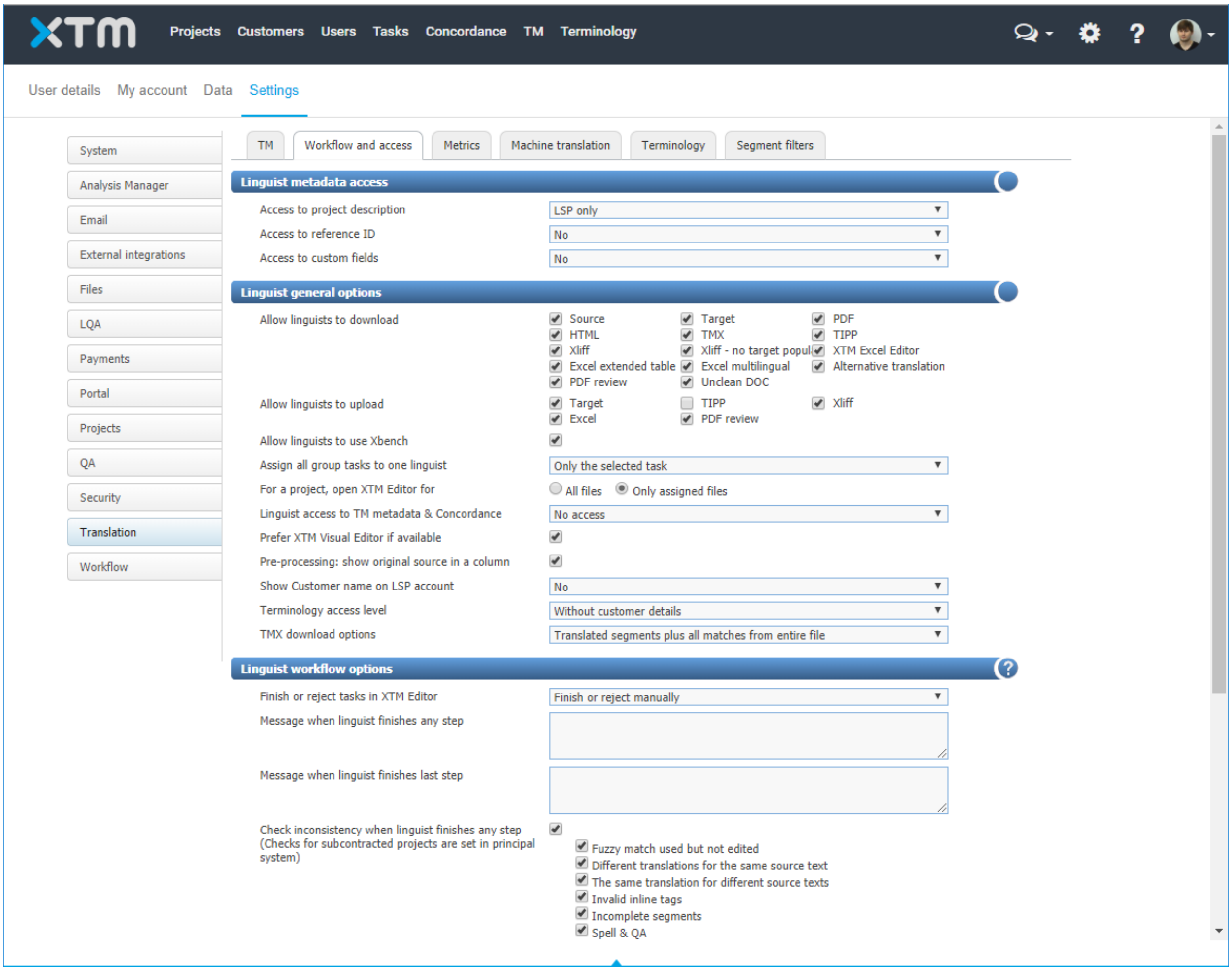
- Mark segments as done in subsequent steps when not changed by corrector. When this is turned on, if corrector1 sets a segment to green without making a change, then all further steps will be set as DONE. If the segment is not set to green or the target text is changed by the corrector, then all further steps will be set as TO BE DONE.

- Mark segments as done in subsequent steps when not changed by corrector: This option can be used to reduce the work load of the linguist following a corrector, as they will only have to check work on the segments that have been changed by the corrector.

- Set non-translatables as done: This section firstly allows you to determine whether this option appears in the interface and what the default value should be. If non-translatables are set as done, then these segments will be automatically set to green and will not require attention from the linguist. You then have three options:
  1) Set all steps to done
  2) The first step only
  3) All steps except the last step.

  Choose either 2 or 3 if you want to have a reviewer or corrector check all segments.

Translation – Workflow and access



Configuration – Settings – Translation – Workflow and access tab

Linguist metadata access
You can specify whether linguists or LSPs can access project description, reference ID or custom fields.

Linguist general options

- Allow linguists to download: This option can be used to allow or prevent users downloading tasks, working offline and then uploading the completed file. This includes Source, Target, PDF, HTML, TMX, TIPP, XLIFF, XTM Excel Editor, Excel extended table, Alternate translations, PDF review and Unclean doc.

- Allow linguists to upload Offline files: As above

- Assign all group tasks to one linguist. This option provides control over how group tasks are assigned to a linguist. There are four options for this item.

  - Only the selected task
  - Only the selected task in all possible steps
  - All available tasks in the selected step
  - All available tasks in all available steps

- For a project, open XTM Editor for all files or only assigned files. Use this item to control access to files when there are multiple translators working on the same target language.

- Linguist access to TM metadata & Concordance: The options here determine if linguists have access to the concordance tab in the translator's in-box. This tab allows the translator to search the TM for phrases and find concordance matches. If you do give linguists access to this data, the options allow you to set how much potentially confidential data in concordance and TM metadata is displayed to the user.

- Show Customer name on LSP account. Specify whether LSPs can see your customer's name, nickname or none.

- Terminology access level: use this option to choose whether translators can see customer details in the terminology metadata.

- TMX download options: There are 5 options:

    - Translated segments plus all matches from entire file
    - Translated segments assigned from entire file
    - Translated segments plus all matches assigned to the user
    - Translated segments assigned to the user
    - Translated segments modified by the user only

Linguist workflow options

- Finish or reject tasks in XTM Editor: This feature gives the linguist the option of finishing or rejecting the task from within XTM Editor by clicking on an icon, rather than doing it from the Tasks tab. There are 4 options

    - Do not allow
    - Finish only
    - Finish or reject manually
    - Finish or reject automatically depending on segment status

  If you select the manual option depending on the workflow step you are in two arrows appear in XTM Editor: Clicking on the red arrow icon rejects the task to the previous step in the workflow, while the green arrows finishes the task and automatically moves it on to the next step in the workflow.

  If you select the automatic option depending on the segment status, then the arrow icons in XTM Editor change to the following red/green icon . If you click on the icon and any of the segments have a blue "To be rejected" status, then the task will be sent back to the previous step in the workflow. Otherwise clicking the icon will move the task to the next step in the workflow.

- Message when linguist finishes any step: If you enter a message here then at the end of each step the linguist will be asked to confirm before the task moves on.

- Message when linguist finishes last step: If you enter a message here then at the end of the last step in the workflow the linguist will be asked to confirm before finishing.

- Check inconsistency when linguist finishes any step: This checks the translation for inconsistencies and will display a custom message that the linguist needs to acknowledge before finishing the task. If a task has been subcontracted then the behaviour of this option is governed by the settings on main system, as the settings on the subcontractor's system are not taken into account. The checks that can be activated are:

    - Fuzzy match used but not edited
    - Different translations for the same source text
    - The same translation for different source texts
    - Invalid inline tags
    - Incomplete segments. The custom alert message is displayed when a task still has red or orange segments

Text formatting

Text formatting in the source and target documents is represented in XTM Editor by numbers in curly brackets eg {1}. If you switch on text formatting in this section users will be able to add additional formatting in the target text. When this feature is not active there has to be the same number of numbers in curly brackets in the source and target texts. This feature is useful for example when formatted words in the source are in one continuous string, but in the target language they are not continuous. Note that the additional formatting is restricted to certain file formats.

When text formatting is enabled in XTM Configuration, a new text formatting section is displayed in Customer settings. Customers can have individual text formatting settings.

Checking the System default check box means that the default settings for XTM will be on, for the file formats shown in the box below.

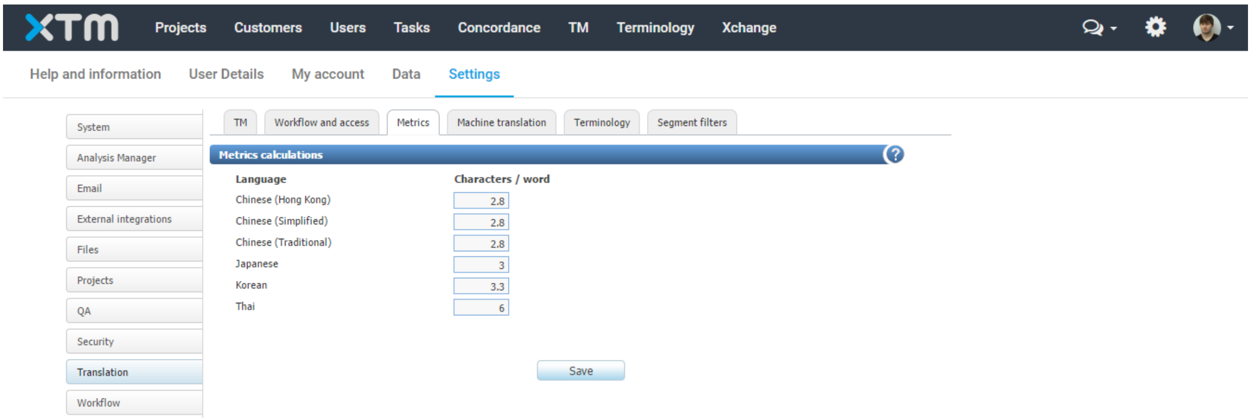
The file formats for which you can use additional formatting are displayed below and you can edit the selection.

The text formatting feature is available in the XTM Editor only for projects created after the text formatting option has been enabled and for file formats specified either in the XTM configuration or under a specific customer setting. It is important to remember that when text formatting is enabled for a project it is not possible to generate any files or packages for offline translation, such as XLIFF files, the Excel Editor spreadsheet or the TIPP package. To enable the generation and import of XLIFF files for projects with text formatting, please contact XTM Support at support@xtm-intl.com.

Translation - Metrics

For character based languages when XTM calculates metrics the number of “words” is estimated by dividing the number of characters by a factor. The result is then rounded up to the nearest integer to give the number of words in the segment and the number of words in each segment is summed to give the total word count in the document.

By default, the values are: Korean 3.3, Chinese (Traditional) 2.8, Japanese 3, Thai 6, Chinese (Hong Kong) 2.8 and Chinese (Simplified) 2.8. If you wish you can change these factors here.



Configuration – Settings – Translation – Metrics tab

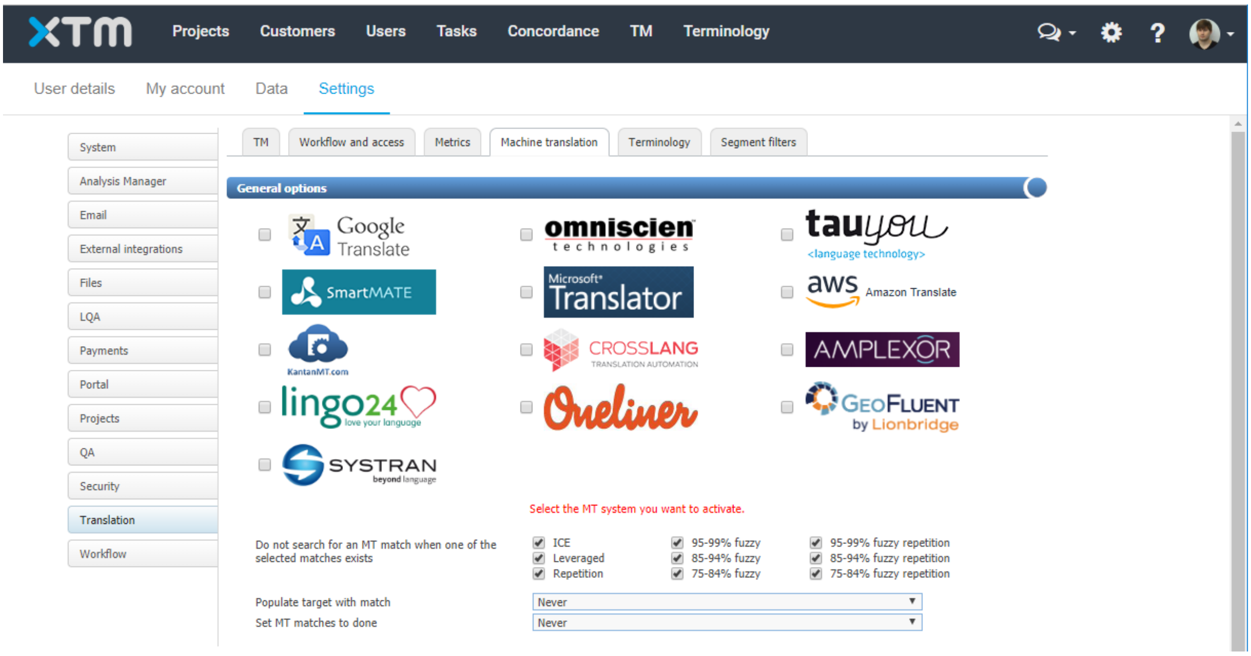
Translation - Machine translation

This tab allows you to set up integrated machine translation engines with XTM so that selected segments are sent to the MT engine and the MT matches are offered to the translator or placed ready for post MT editing.

Check the MT engine that you plan to use and then enter the details in the fields that appear. See below for a description of the engine.

All segments without TM matches are sent for MT matching. You can also send segments that have varying levels of TM matches. Check the boxes of the type of match you want to send.

You also have the option to populate the target segment with the MT match taking into account inline elements and decide whether to set MT matches to done.



Configuration – Settings – Translation – Machine translation tab

Google Machine translation: By default, Google machine translation is switched off. This is to ensure the security and confidentiality of your data. While your data is kept on the XTM server it is secure, however when it goes out to be processed by Google Machine translation, XTM International cannot guarantee its confidentiality. We recommend that you only switch this option on if you are not working on confidential information.

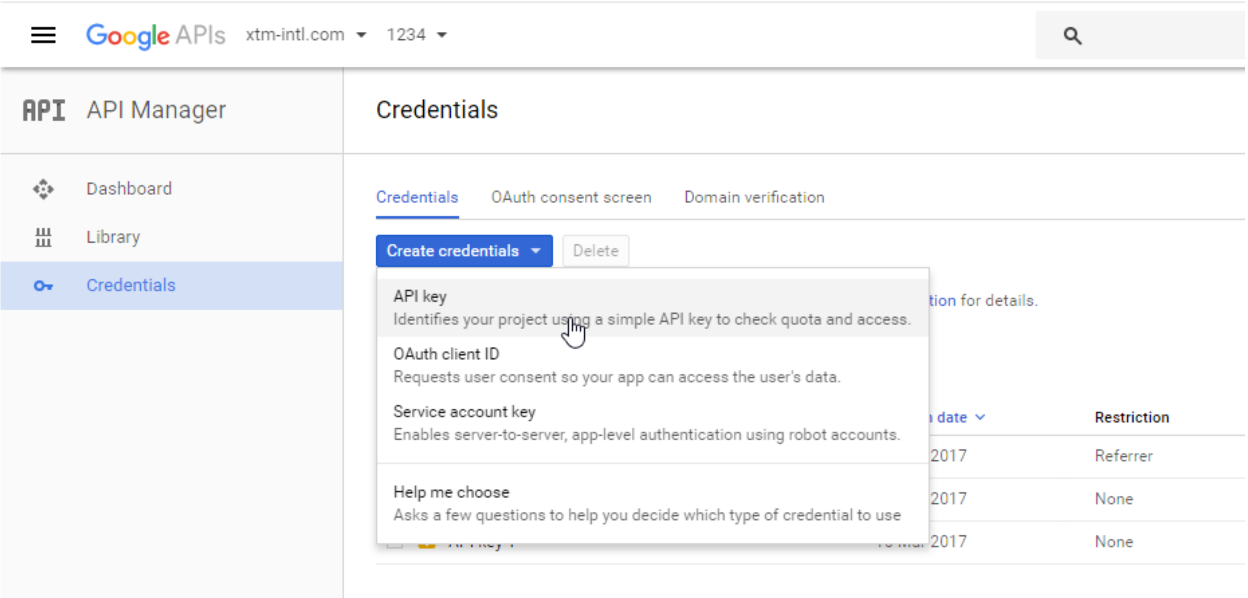
Texts can be sent for Google machine translation after the project analysis, when working in the XTM Editor or both.

The Google Translate API v2 is a paid service that is not covered by your XTM subscription, therefore if you decide to use this option, you need to create an API key and have a paid account with Google.

To do this:

- Go to https://code.google.com/apis/console
- Sign in using your Google account details
- Go to https://console.developers.google.com/iam-admin/projects to create a project if you do not have any
- Go to https://console.developers.google.com/apis/api/translate.googleapis.com/overview and click ENABLE
- Go to https://console.developers.google.com/apis/credentials and click the Create credentials button, select API key
- Click Restrict key, under Key restriction select HTTP referrers (websites), paste https://www.xtm-cloud.com/* into the input field and click the Save button
- Go to https://console.developers.google.com/billing to fill in your billing details
- Copy the key into the key field in XTM

The cost for using Google machine translation is published here http://code.google.com/apis/language/translate/v2/pricing.html. The character count used by Google is based on the source language and includes spaces.



Credentials – Create credentials – API key

Omniscien Language Studio: https://omniscien.com/ XTM has been integrated directly with the Language Studio translation and training platform using the Language Studio API. Before setting up XTM to work with Language Studio, you firstly need to create an account with Omniscien. Then using the information provided from Omniscien complete the fields in this configuration section. You can then set within each customer record whether you wish to use Language Studio or when creating a new project, you have the opportunity to switch on Language Studio and change the default settings for the Language Studio project and Domain.

The integration works in the following way: When you create a new project, XTM analyses the source file and matches the segments with your TM. XTM then sends the XLIFF to Language studio for matching of any unmatched segments. This may take some time so that project creation will take longer than is normally the case. Once complete, Language Studio sends the matched XLIFF back to XTM and the file is ready for translation in XTM Editor.

Tauyou: tauyou <language technology> provides domain-specific machine translation solutions for LSPs. With the private Translation Memories (TMs) for each client, and additional public domain data, tauyou creates a dedicated system for every customer, including translation glossaries and forbidden word lists. tauyou has experience in 30+ languages (and their combinations).

For more information, and to set up an account please send an email to info@tauyou.com.

SmartMATE

Provided by Capita TI. You can find more details here: https://www.smartmate.co/

Microsoft translator

Microsoft Translator delivers automatic translation (Machine Translation) of a text into a specified language. It is a state-of-the-art statistical machine translation system translating between any of the supported languages, and powering millions of translations every day. You can find more details here: https://www.microsoft.com/en-us/translator/default.aspx.

There are different levels of access to Microsoft Translator.

1. Use Collaborative Translation Framework

If Use Collaborative Translation Framework is checked you can use Microsoft Translator for free and no Client ID or Client secret is required. Using XTM's credentials, XTM Editor sends un-matched or fuzzy matched source segments for translation. These matches are then displayed for the translator to use and edit as required. After translation the target segment of these Microsoft Translator matched segments is returned to Microsoft and is available for use by other Microsoft Translator users.

2. If you choose not to use the Collaborative Translation Framework then you must obtain an access token to use the Microsoft Translator API. This token provides a secure access to the Microsoft Translator and to associate your requests to the Microsoft Translator service with your account on Azure Marketplace. This level of use is still a general domain but your translations are not sent back to Microsoft or made publicly available.

   Microsoft provides methods to obtain access tokens safely, repeatedly, and easily. To obtain an access token, perform the following steps:
   - Subscribe to the Microsoft Translator API on Azure Marketplace
   - Register your application Azure DataMarket

   Subscribe to the Microsoft Translator API using Microsoft Azure
   Basic subscriptions, up to 2 million characters a month, are free. Translating more than 2 million characters per month requires a payment. You can find more details here: https://azure.microsoft.com/en-us/services/cognitive-services/translator-text-api/

3. Microsoft Translator HUB

   Microsoft Translator HUB creates a private memory for a specific key. This memory is not public and is not published on line. You can train this memory with domain specific TMs.

   Microsoft hub allows you to create a custom MT engine by using your own TMs. Built on Windows Azure, Microsoft Translator Hub is an extension of the Microsoft Translator platform and service. You can find more details here: https://hub.microsofttranslator.com/SignIn?returnURL=%2FHome%2FIndex.

Amazon Translate
The machine translation engine details are available here: https://aws.amazon.com/translate/.

KantanMT

- Default setting: This is the default setting whether KantanMT should be used for new customers and for new projects.
- API URL: This is the endpoint of the KantanMT server. The default value is: http://www.kantanmt.com/api.
- Token: This is the password to KantanMT's API and should be provided by KantanMT. This value is passed to the KantanMT server during translation and it is not sent to translators.

It is important to note that the MT translation process can take some time and so the analysis process will take longer than normal when using KantanMT.

CrossLang
The machine translation engine details are available here: http://www.crosslang.com/en/machine-translation/services

Amplexor
The machine translation engine details are available here: https://www.amplexor.com/en/our-solutions/globalcontent-language-solutions/translation-management-technology/machine-translation.html

Lingo24
The machine translation engine details are available here: http://www.lingo24.com/services/machine-translation/

Oneliner
The machine translation engine details are available here: http://oneliner.be/index.html

Lionbridge GeoFluent
The machine translation engine details are available here: https://www.lionbridge.com/en-gb/geofluent

SYSTRAN Pure Neural™
The machine translation engine details are available here:
http://www.systransoft.com/systran/translation-technology/pure-neural-machine-translation/

Translation - Terminology

In the Configuration > Settings > Translation > Terminology screen you can select basic terminology options for all users.

Terminology options

- Highlight all term variants. This option determines whether only the term stored in XTM is highlighted or if stemming should be used to highlight all variants of the term in XTM Editor.

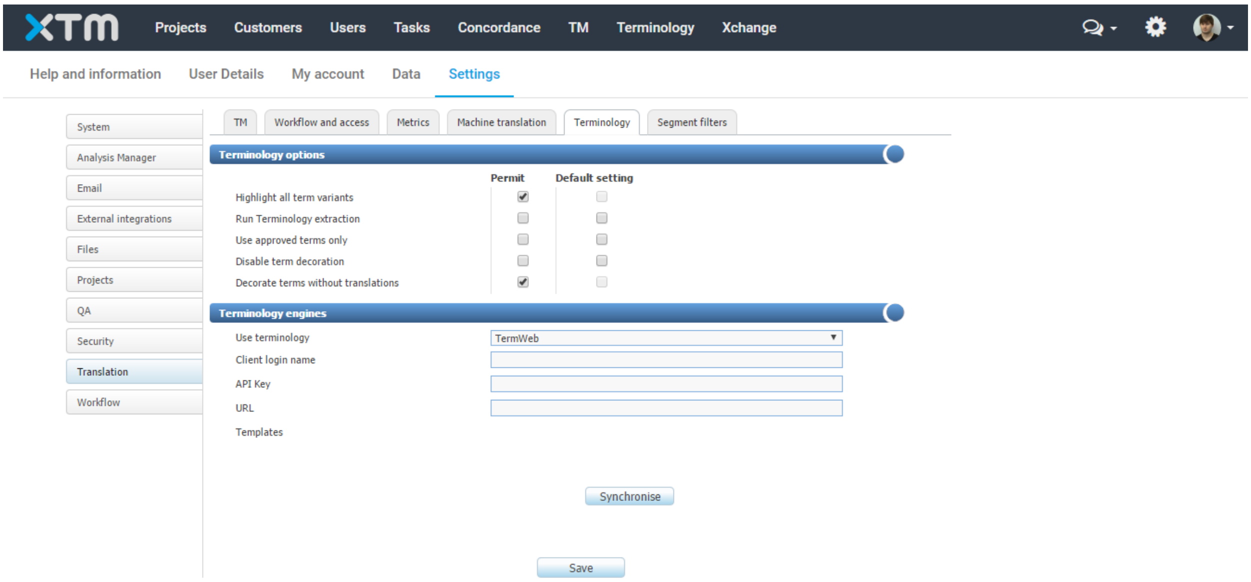
- Run Terminology extraction: When checked XTM will extract a list of candidate terms as an additional step in the file analysis. The candidate terms are produced as an Excel spreadsheet which can be downloaded from the Download option of the Context menu in the Project listing.

- Use approved terms only: Check this option to use only terms with the Approved status.

- Disable term decoration: Check this option to let all users choose during project creation whether terms found in the source language should be highlighted in XTM Editor. When checked it will still be possible to select a word and use the context menu to add it to the terminology.

- Decorate terms without translations: Uncheck this feature to stop decorating terms without translation for the respective language. When the feature is enabled, terms are decorated in all languages even when there is no translation for them in a specific language.

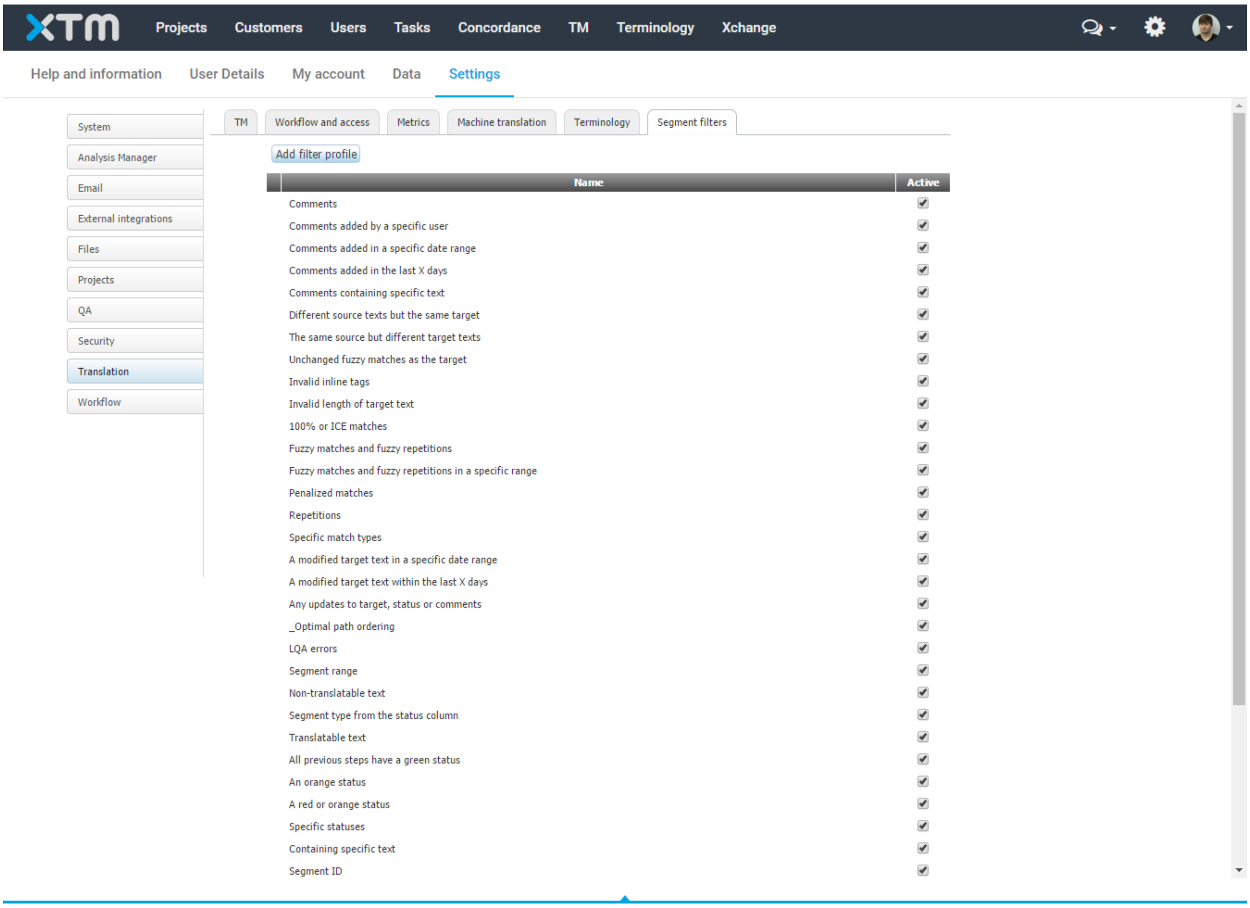
Terminology engines
XTM has a very comprehensive built in terminology module that is described in the XTM Terminology chapter.



Configuration – Settings – Translation – Terminology tab

XTM can also be fully integrated with TermWeb from Interverbum Technology. When this is activated all the functionality of the XTM Terminology module will be replaced by TermWeb. To set up TermWeb within XTM you need a separate TermWeb account and then you need to enter company name, username, password and link. Please contact Interverbum Technology for further details about a TermWeb account. www.interverbumtech.com.

Translation - Segment filters



Configuration - Settings - Translation - Segment filters

The segment filters tab allows you as an administrator to set which filters and filter profiles are available to your users. By default, all filters and profiles are switched on. Un-check any filter or profile that you do not wish to appear and click Save.

Filter profiles

You can create advanced, customized filters by joining two or more segment filters together using Boolean AND/OR operators and saving the combination as a Filter Profile. You can also save frequently used configurations of a single filter for convenient reuse. Saved Filter Profiles appear at the top of the Segment Filter list with an icon to their left.

Creating filter profiles

Clicking the Add filter profile button opens the Add filter profile window.

1. Check the box next to the desired filters in the list and configure their parameters. Check the Exclude box to exclude segments matching that condition from the display.
2. If more than one filter is selected, choose whether to join the filters using the AND or OR Boolean operator using the radio buttons above the filter list.
    a. The AND operator means all of the conditions must be matched for a segment to be displayed.
    b. The OR operator means that only one of the selected conditions must match segments to be displayed.
3. Enter a descriptive name for the filter profile in the Profile name field.
4. Click the Save profile button to save the filter profile. The new filter profile will appear at the top of the segment filter list.

Activating and deactivating filter profiles

Filter profiles can be switched on or off just like any other segment filter. By default, newly created filter profiles are switched on. To deactivate a filter profile un-check the box in the Active column and click Save. Deactivated filter profiles will not be available to users.

Modifying filter profiles

Click the icon to the left of the filter profile name and select Edit from the dropdown menu to open the Edit filter profile window. The current profile name, Boolean operator, selected filters and their parameters are all displayed in the window. Make any desired changes to the profile configuration and click Save profile to save your changes.

Deleting filter profiles

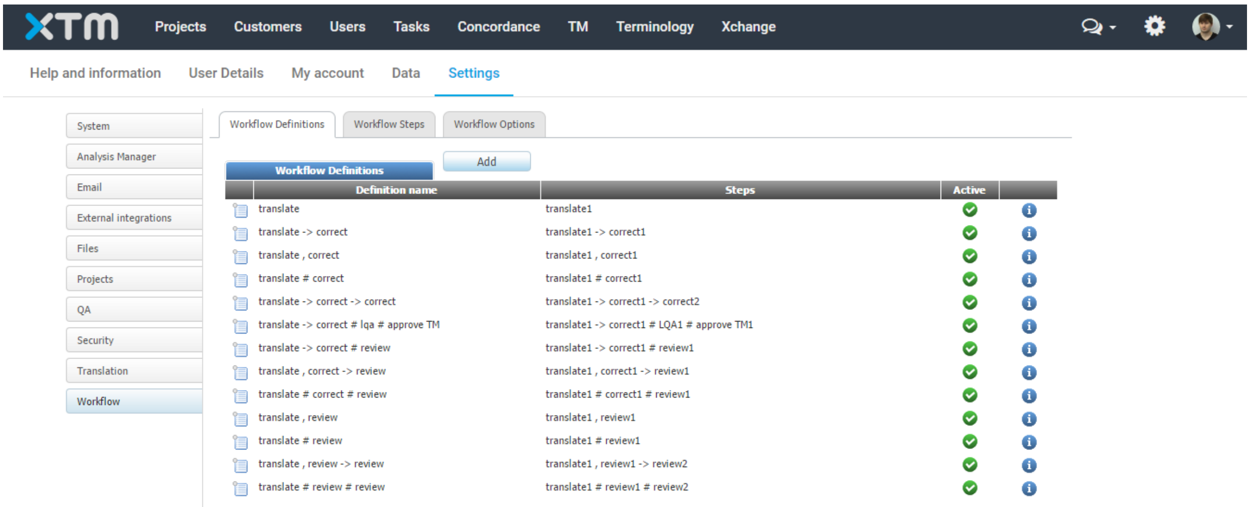
Click the icon to the left of the filter profile name and select Delete from the dropdown menu. Click OK in the confirmation box to delete the filter profile.

Settings - Workflow

The workflow tab allows you to define new workflow steps and create new workflow definitions.

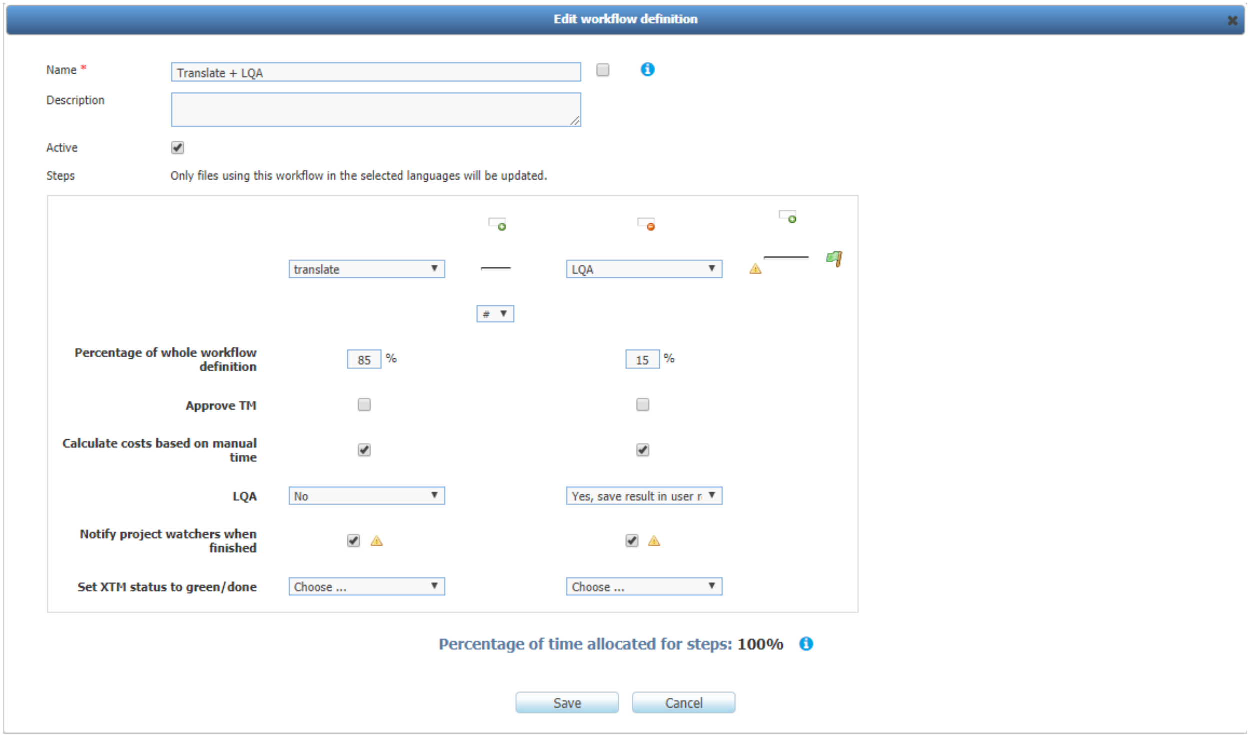
For more information about workflow steps, the transitions between them and workflow definitions are described in the chapter Settings - Workflow Definitions.

Workflow definitions



Existing workflow definitions

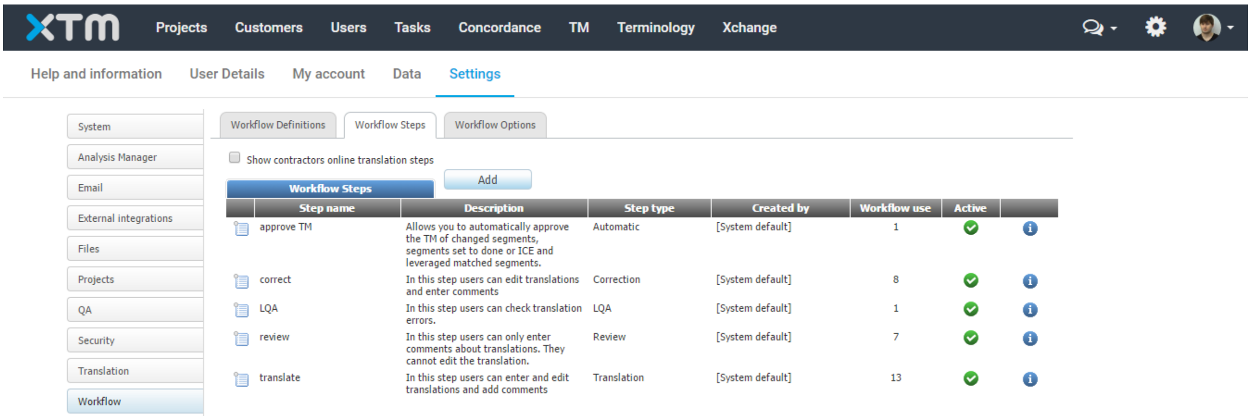
To add a new workflow definition click on the Add button and the following screen appears. By default XTM will automatically generate a name for the workflow based on the steps you choose. Add the steps as required by clicking on the icon, and selecting the step type from the pull down menu, then choose the transition between steps. You can specify how much percentage of the entire project workflow time should be automatically calculated for each of the steps, at which steps to approve the TM; whether to allow calculating costs based on time manually entered by the users, include LQA functionality, notify project watchers about completion of the project and whether to change the status of segments to green – done. Finally click Save.



Creating a new workflow definition

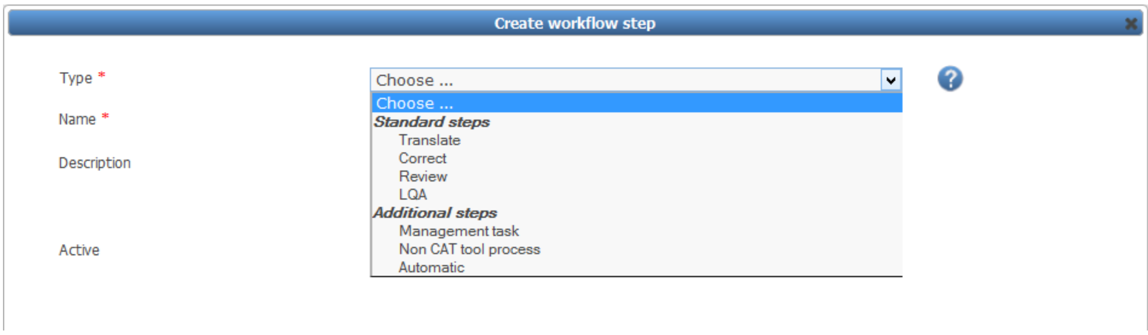
Workflow steps

Click on the Workflow Steps tab to show a list of the currently existing steps.



Reviewing the existing workflow steps

To add a new step click the add button and enter the required information. There are a number of different types of step that are listed in the pull down menu



Adding new workflow steps – step types

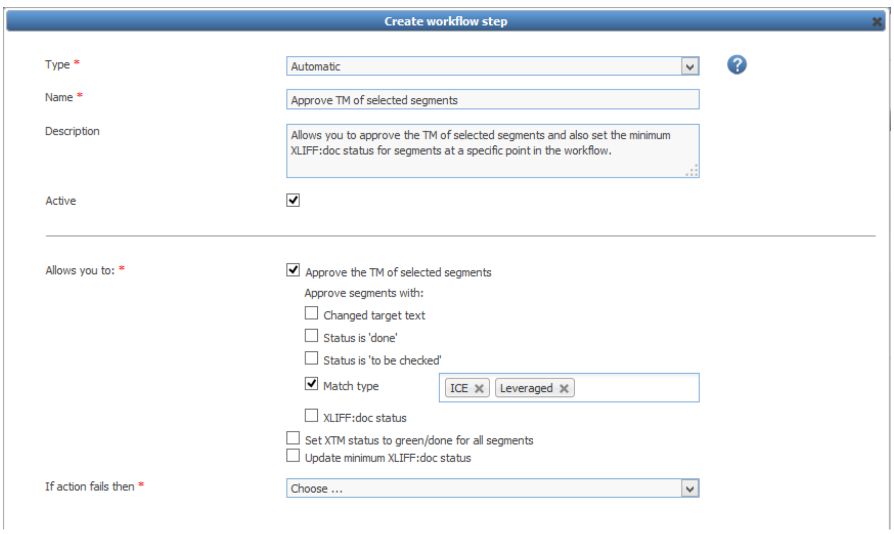
The standard steps shown allow you to create a new step with the same functionality as a standard step but give it a different name.

There are 3 different types of additional step:

1) Management task. An example of this would be an approval step before the translation process starts.
2) Non CAT tool process. An example of this would be the DTP step after translation where an engineer has to download the target file and make some alterations to the layout before the project is complete. Changes to the target text made in this type of step are not saved in the TM or terminology database.
3) Automatic task. Allows you to:
   a) Approve the TM of selected segments.
   b) Set the XTM Status to green/done for all segments
   c) If TIPP is activated in Configuration > Settings, then the automated step also gives you the option to set the minimum XLIFF:doc status for segments at a specific point in the workflow.

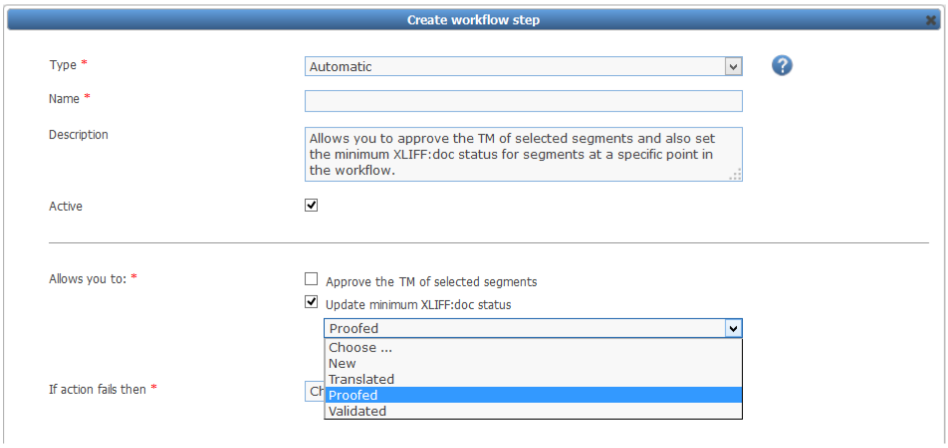
For approval of the TM the options for selecting the segments are:

a) Segments with changed target text
b) Segments with a status of “done”
c) Segments status of “to be checked”
d) Segments with a match type of ICE, Leveraged or non-translatable
e) With a specific XLIFF:doc status: translated, proofed or validated



Adding a new automatic workflow step – Approving TM status

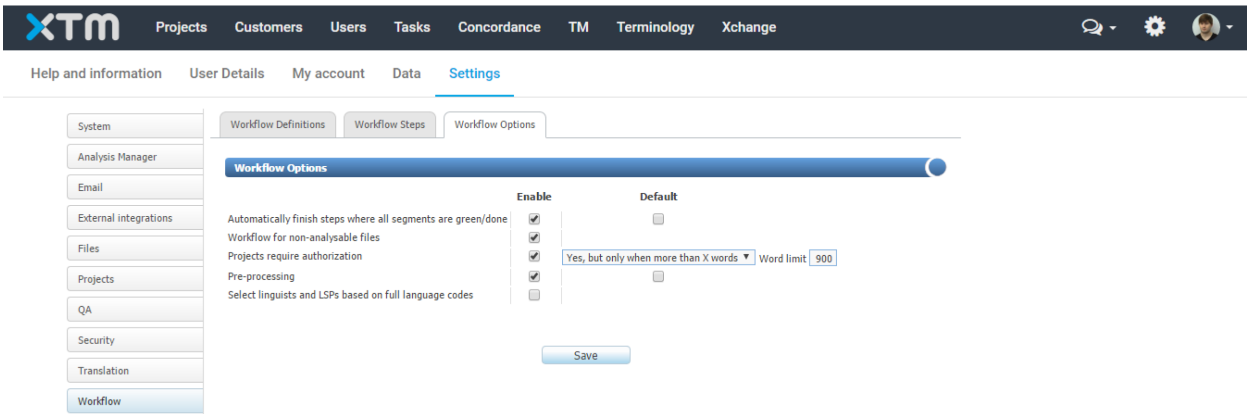
When updating the XLIFF:doc status firstly set the minimum status you want from the pull down menu and decide if you want to update the XTM segment status to green/done



Adding a new automatic workflow step – updating the minimum XLIFF:doc status

For all of the above automatic actions you can decide what to do if the action for whatever reason fails. You can either stay on the same step or move to the next step

.Workflow options



Workflow Options tab

The options are:

1) Automatically finish steps where all segments are green/done. Check this box to automatically finish steps for files that only contain green segments, e.g. In-Context Exact Matches or segments set to done using “Set ICE/leveraged matches from approved/not approved TM to done” or “Set non-translatables as done”.

2) Workflow for non-analyzable files. Check this box if you want to give non-analyzable files, such as .jpg files, a workflow. This displays an option in the project creation window to select the desired workflow for non-analyzable files

Project creation – setting the workflow for non-analyzable files

3) Project requires authorisation from Customer PM if more than X words – If this option is enabled then you can enter the default value, which can be No, Yes and only for projects that are bigger than a specified word limit.

4) Pre-processing. This option allows a project manager to create a project with a pre-processing workflow. This can be useful for:
   a. Locking segments so they are not taken for translation.
   b. Editing the source text prior to analysis and translation. In this case the new source language is the same as the original source language.
   c. Using pivot languages. Here the source language is firstly translated into one language and then that target language become the new source for the translation into other target languages.

   When pre-processing is enabled, you can select the default behaviour during project creation:
   - No: you can enable pre-processing during project creation but it is disabled by default.
   - Yes, source segmentation: the new source text segmentation matches the segmentation of the original source text.
   - Yes, new source segmentation: the new source text is segmented based on the content provided during the pre-processing step. As a result, there may be a difference in segmentation between the pre-processing and the actual translation workflow steps.

5) Select linguists and LSPs based on full language codes. Enable this feature to assign only linguists and LSPs whose language combinations fully match the project languages, including the language locale. When this option is disabled for example, it is possible to assign a linguist with English (UK) source language to a project with an English (USA) source text.

XTM and LDAP

Overview

If you have an existing LDAP server (e.g. Active Directory) it is possible to use it for authentication of XTM users. This method of authentication allows companies to set their own password policies such as password expiry. It is also easier for administrators to manage one common account for each user. In this way the user can use one account name and password to log into several applications (e.g. XTM with LDAP authentication enabled).

Before you enable LDAP authentication make sure that each user has an account in XTM with the same login details as those within LDAP. Every account must exist in XTM database, but the password is checked only on LDAP server side.

LDAP authentication can be set to work in one of the following ways:

- Users are authenticated using distinguished names (DN)
- XTM uses an external service account to connect to LDAP. In this case the users do not need to provide full user DNs. They can be found using different criteria such as sAMAccountName or their e-mail address.

Configuration

The XTM LDAP configuration file is located in xtm/confs/common/ldap-conf.xml under XTM root dir (e.g. /xtm/ xtm/confs/common/ldap-conf.xml)

To enable LDAP authentication you have to edit the configuration file:

a. Set active to yes
b. Set host to your LDAP server address
c. Set domain to your domain
d. Set correct userTableName (e.g. Users)
e. If you want to enable logging into XTM only for specified group of users set group-name to the group you want to allow to log in
f. If you want to enable ssl (Secure Sockets Layer):
    i. Set ssl to yes
    ii. Set keystore_path to Java’s keystore (the keystore must contain certificate of host from 2.b)
    iii. Set keystore_password to Java’s keystore

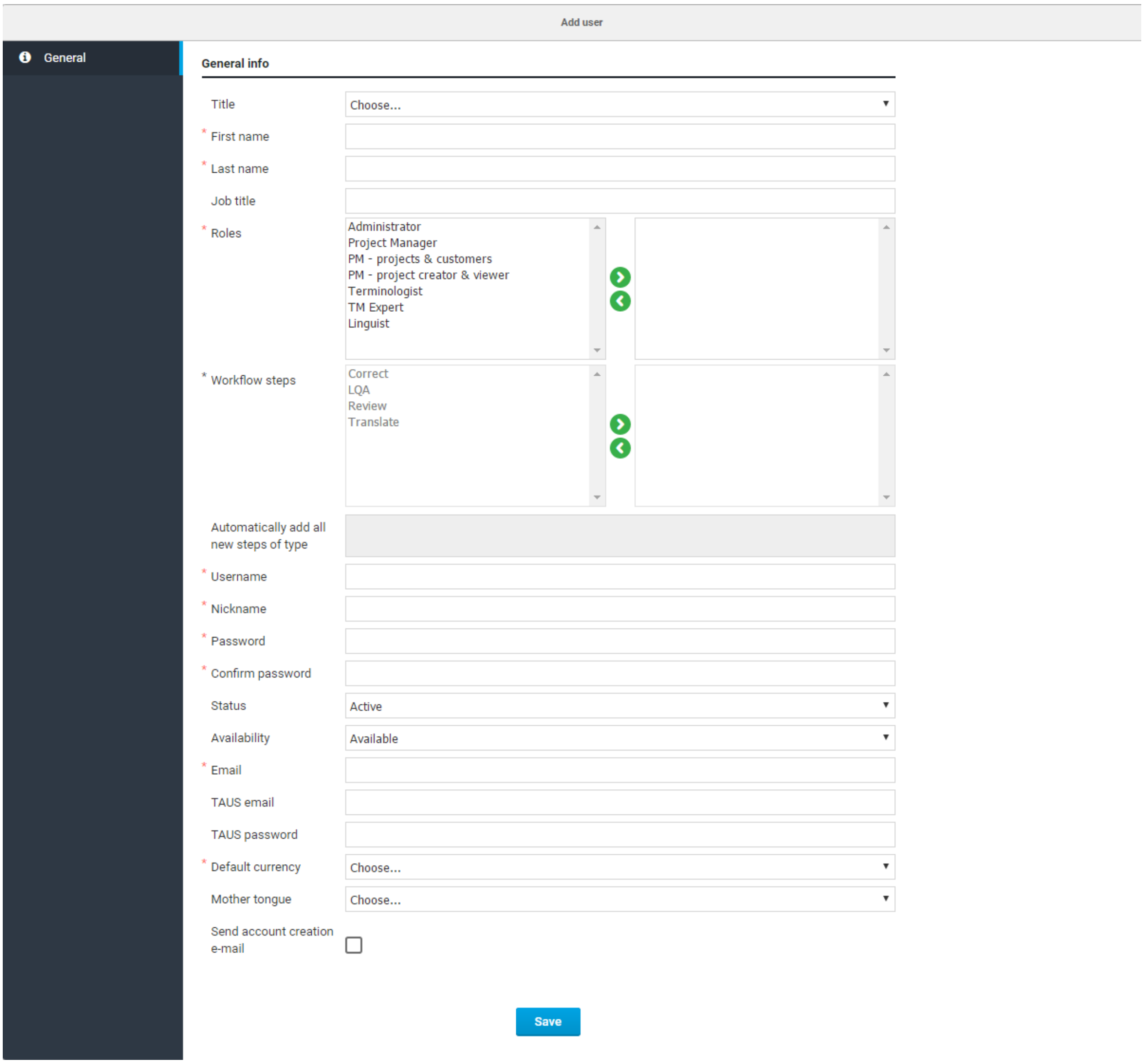
After starting XTM you will then be able to log in using credentials from the LDAP server.

Adding users

An administrator can add and edit users with all roles including additional administrators. A project manager can add and edit users with all roles except administrators. Users with other roles cannot add or edit additional users; they can only edit their own details.

To add users to your system, click on the users tab and then from the user listing click the Add user button. Initially enter the general information about the user. Obligatory information is marked with a red star. The role field allows you to determine the type of user. Select the roles that you want this user to perform.

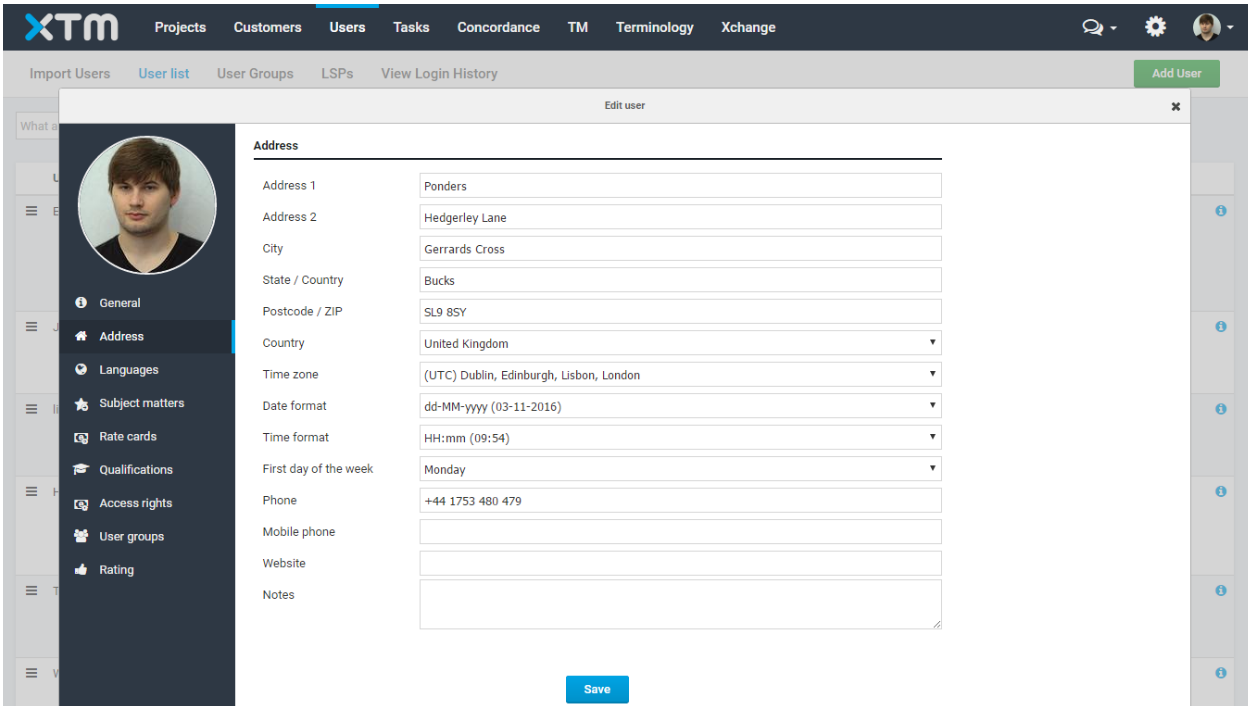
When you click save you will be taken to other tabs to complete and you will be able to add the user photo.



Adding a new user - General info

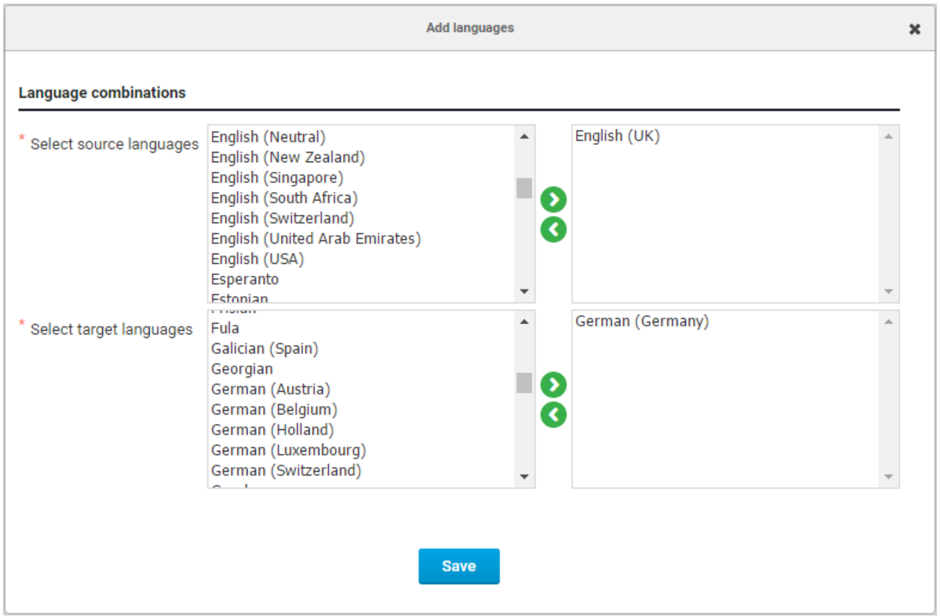
Depending on the roles that you selected, further tabs appear on the left hand side. These options are described below.

Address: Enter the user's address and other contact details.



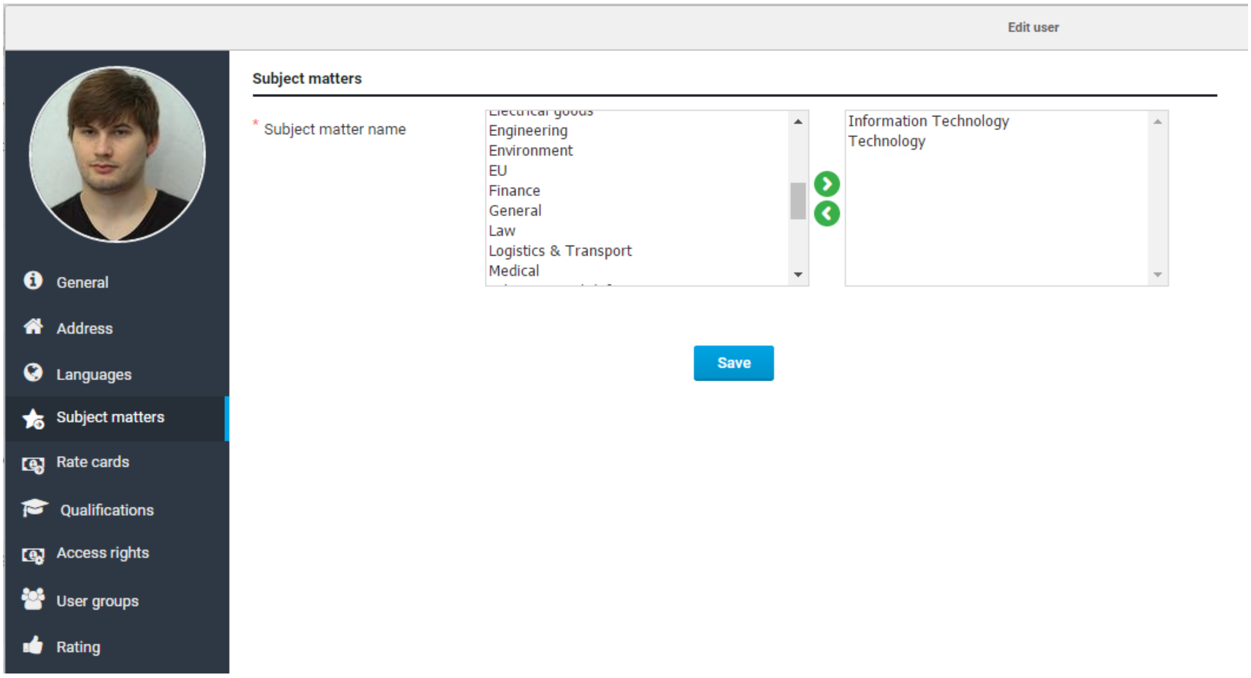
Adding a new user - Address

Languages: If the user is a linguist then you need to define the languages that they can process. Click on the Add languages button, select the relevant source and target languages and click Save



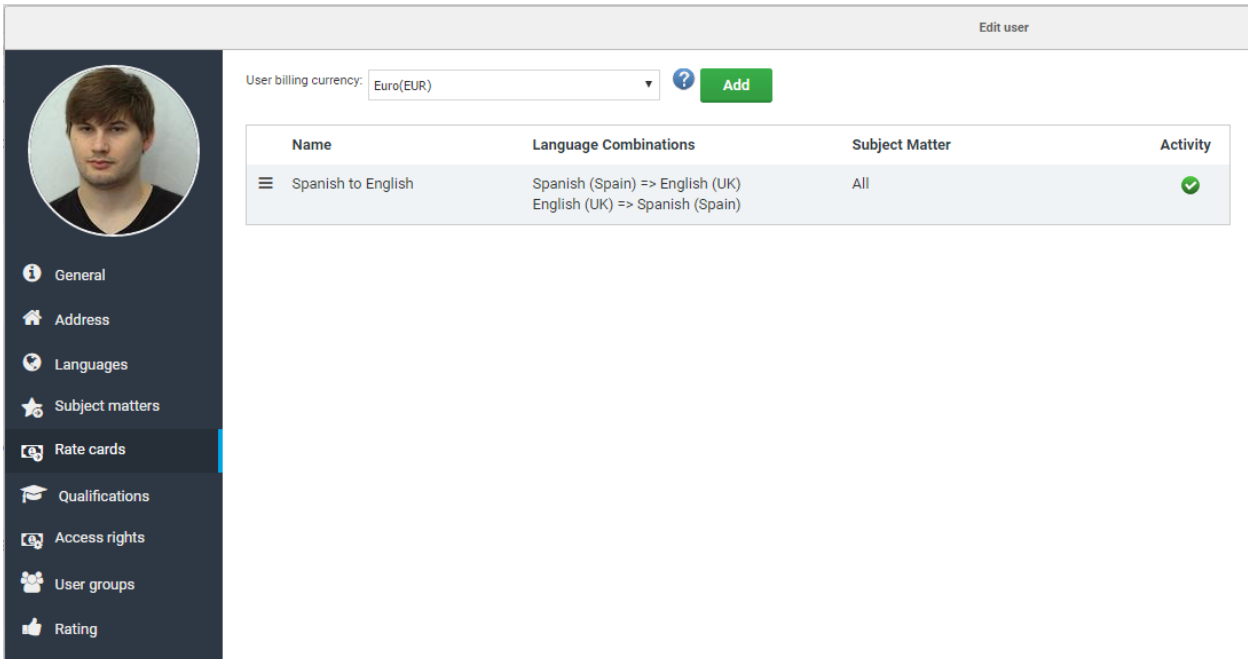
Adding a new user - Languages

Subject matters: Then select the subject matters in which the user has expertise.



Adding a new user – Subject matters

Rate cards: XTM has a highly flexible a rate card function that supports billing in a defined currency. Firstly set the billing currency from the pull down list. Each user can have only one active billing currency. This currency and its associated rate cards are used when creating purchase orders for the user.



Adding a new user – Rate cards

Click the Add button to add a new rate card. For each rate card you can define

1. The name
2. A description
3. Whether the rate card is active or not
4. One or more language combinations – either single languages or groups
5. One or more subject matters

Then you can define how the cost of the task will be calculated. It can either be based on factors or actual prices. You can also set whether the calculation should be by word or character.

If you choose factors, you must enter a base price which will be multiplied by the percentage values you enter for the different types of match in each step, to work out the cost.

If you use actual prices then you should enter the actual prices for each type of match for each step.

For both types of calculation you can also define:

1. The number of words per day
2. A minimum charge

Under the General fixed price heading you can set

- A fixed price per project
- A fixed price per language,
- A fixed price per file
- A management fee percentage

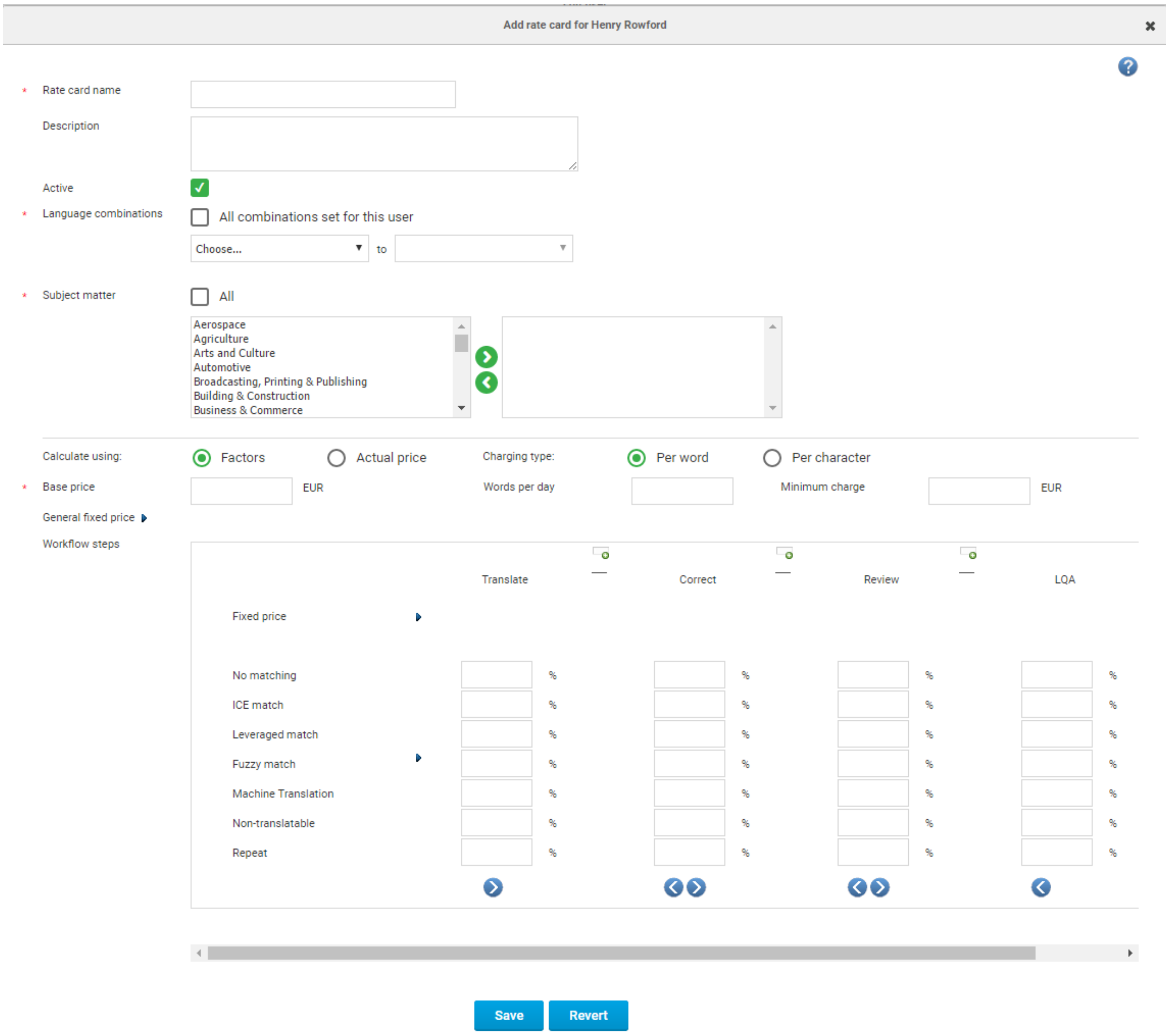
Then for each workflow step you can define

1. A fixed price project
2. A fixed price language
3. A fixed price file
4. A management fee percentage
5. Minimum charge
6. Price per hour.

The rates for fuzzy matching factors or actual prices can be set as a global figure or individual figures for each band.

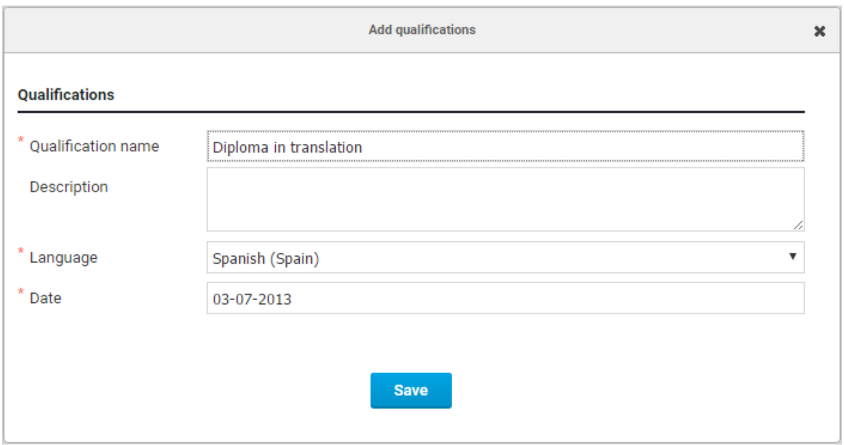
You can add or delete additional steps to the workflow by clicking on the or icons and you can copy the values between workflow steps by using the blue arrows near the bottom.

When you have finished entering data in the rate card click the save button.



Adding a new user – A rate card

Qualifications: Then enter the qualifications of the user.



Adding a new user – Qualifications

Access rights: If you give a user any role other than Administrator, the Access rights tab will appear. This tab gives you the ability to define what the user can do in these areas.

Customers
If you do not specify a customer, then the user will be available to work on projects for all customers. When a user has access to all customers, they will also get access to newly created customers. When some customers have been selected from the list, the user will have access only to the selection. In such case, the user will not see projects for any newly created customers.

Projects
By selecting the “Only show this user's projects” option you can restrict the user from seeing projects created by other people.

Editor
Choose whether the user can lock and unlock segments, only unlock them or has no locking rights. Decide if the user can display metrics in the XTM Editor.

LQA
When you give a user access rights to show LQA results for an evaluee or evaluator, an additional LQA section is visible on their Tasks tab. Depending on their rights, the tab displays projects in which the user was involved as an evaluee, as an evaluator or both sections.

Terminology and Translation Memory
For TM and Terminology: There are two account types:

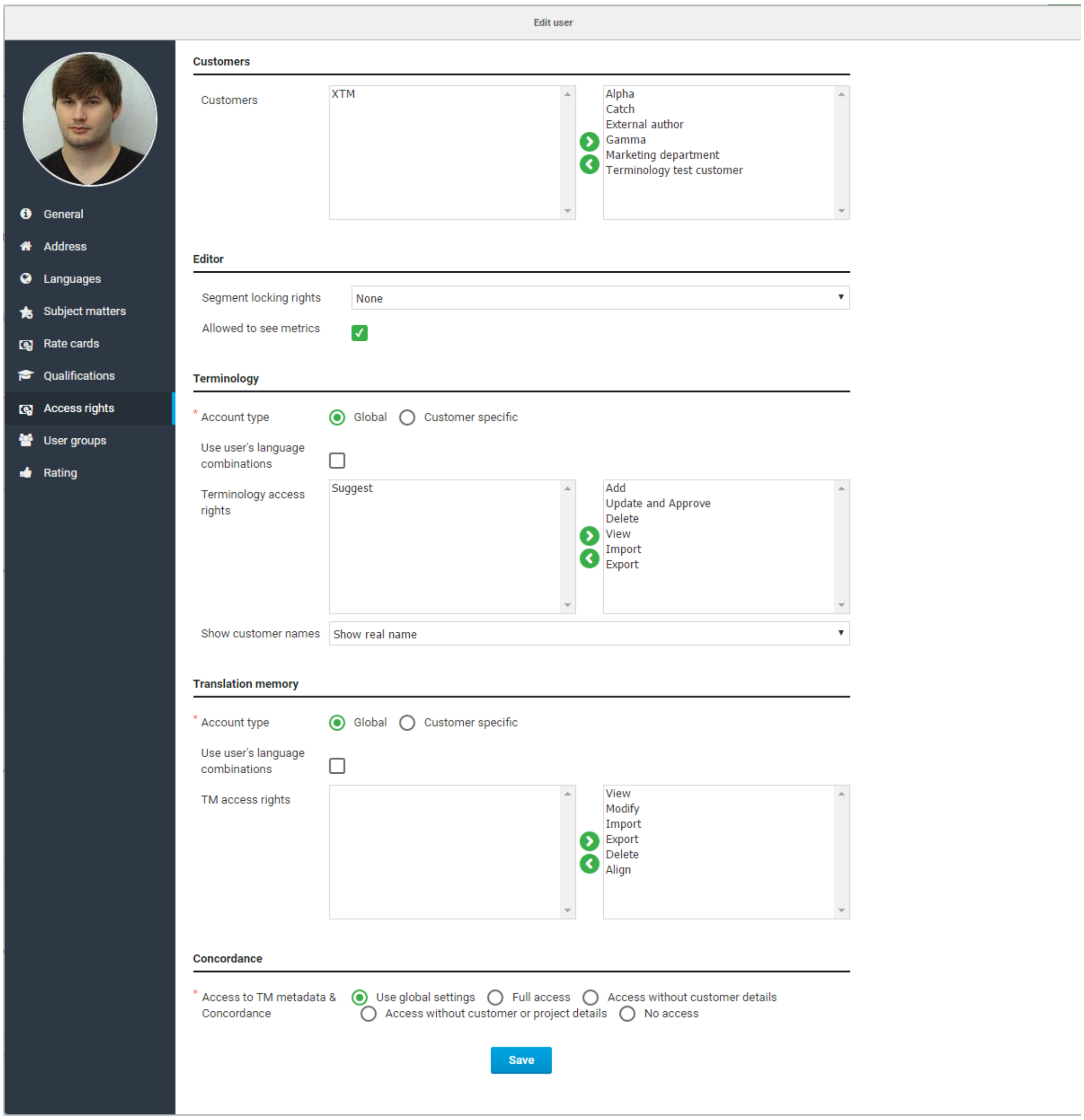
1) Customer specific. This account type can only access the TM and terminology of the selected customers. When this option is selected, choose the required customers in the multi-select box
2) Global expert. This account type can access all the TM and terminology in the system for all customers.

You are also able to limit the user’s access to TM and Terminology to the user’s language combinations by checking the available box.

For terminology you can determine if the users can modify, import, export, view and add terms. For TM you can determine if the users can modify, import, export and view TM.

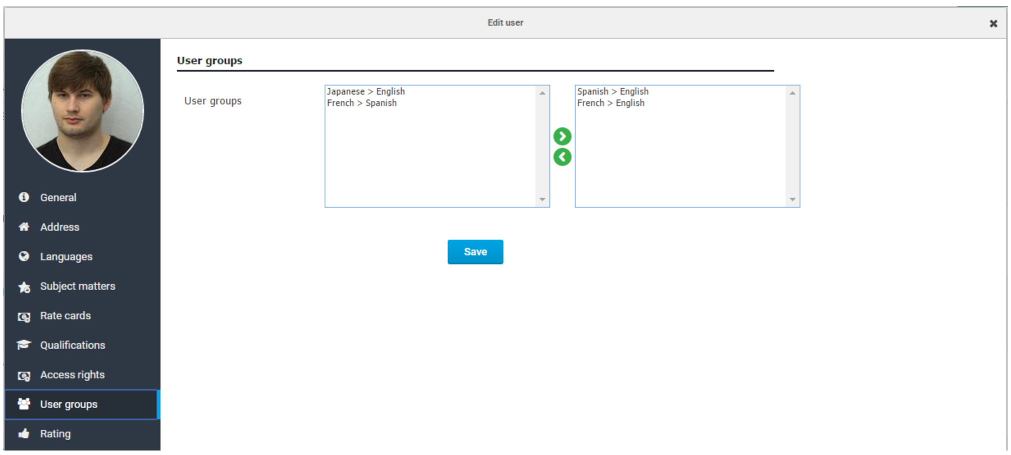
Concordance
Access to TM metadata and Concordance: You can set XTM to use the system’s global settings for the user or you can define the user’s rights separately. The options are:

- Use global settings
- Full access
- Access with customer details
- Access without customer or project details
- No access



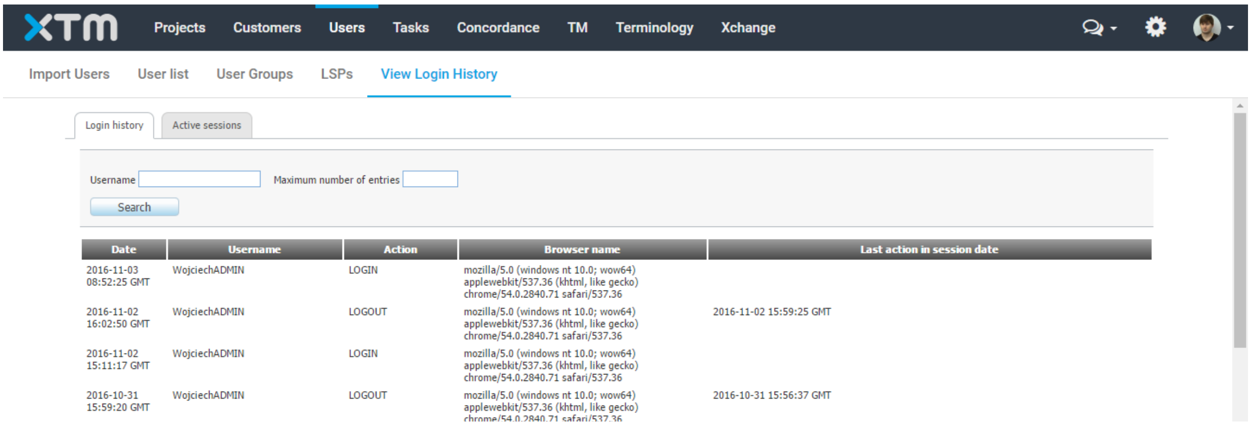
Adding a new user – Access rights

User groups: If you want to add the user to a user group select the User groups tab and then double click on the desired user group in the left hand box.



Adding a new user – User groups

View login History

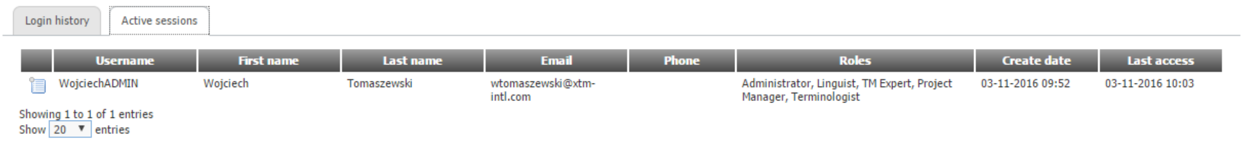


The view login history screen

This screen allows you to see who and when a user has logged onto your system and when they logged out.

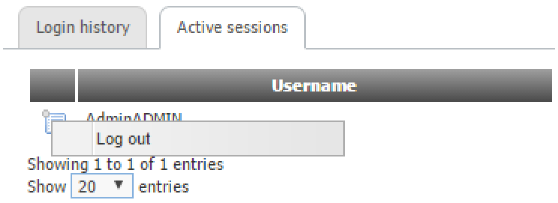
Active sessions

Clicking on the Active session button displays a list of the users who are currently logged onto XTM.



The list of active sessions

You can force a user to log out by selecting the option from the context menu as shown below.

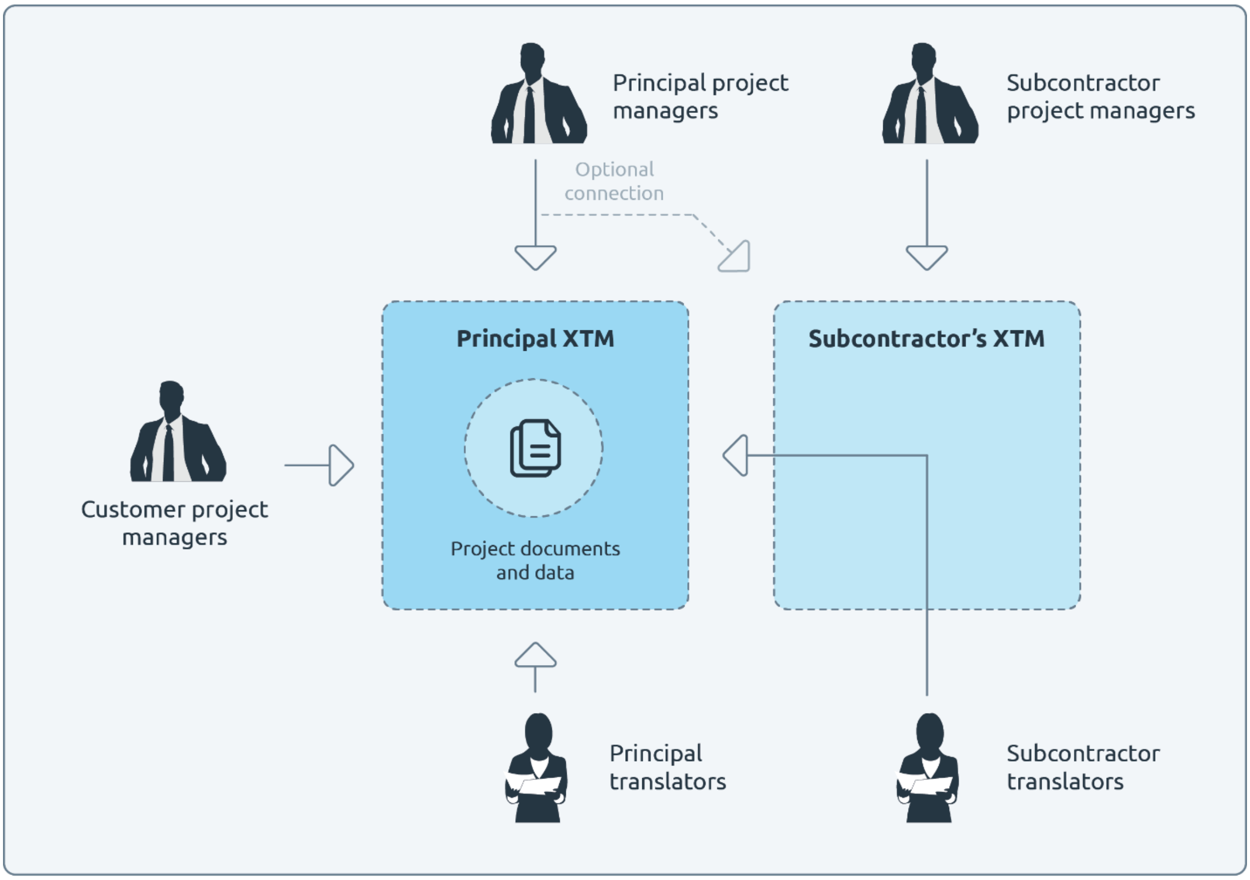


Forcing a user to log out

Subcontracting

Overview

It is possible to link your XTM system to other XTM systems, so that you can allocate tasks in your workflow to another LSP or receive tasks from other LSPs.



XTM subcontracting schematic diagram

If you have created a project in your copy of XTM, the subcontracting feature allows you to allocate tasks in the workflow to subcontractor LSPs, rather than individuals. This process allows the subcontractor LSP to keep the contact details of their translators and reviewers confidential. All translation data remains within your XTM and the subcontractor's translators simply connect through to it via their browser. In turn it is also possible for a subcontractor LSP to allocate the work to another subcontractor LSP if required. Metrics and Statistics are updated in real time on both systems which ensures that the status of the project, in your copy of XTM, is always up to date.

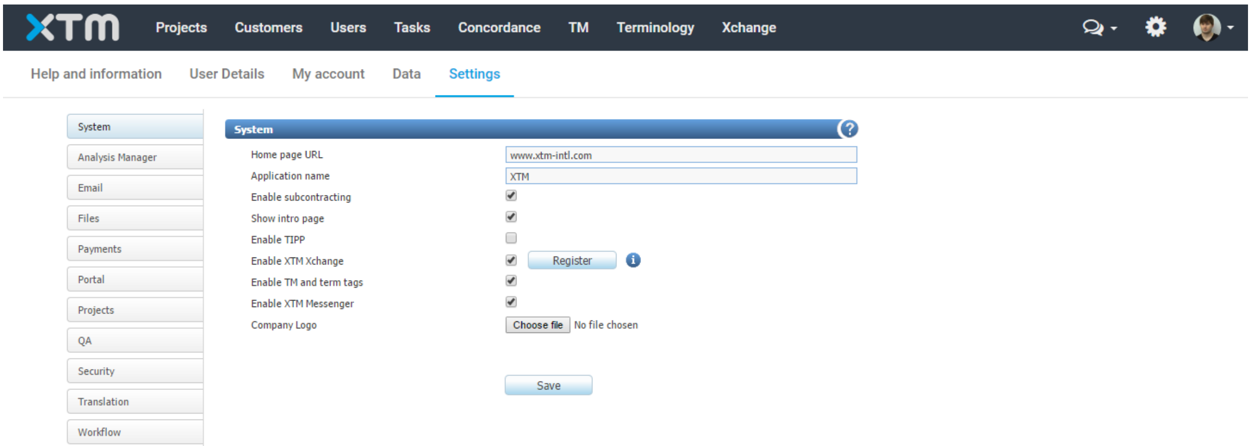
Subcontractor licencing

If you are the subcontractor, then you can either use a free limited version of XTM, where you can work on jobs as a subcontractor but cannot create new projects yourselves or alternatively you can use a full, paid copy of XTM.

If you use a free subcontractor licence, when you are working on a task you will use paid licences from the principal system. The number of licences available to you is configured by your customer in their XTM account. If you use a paid XTM account when you are working on a subcontracted task you will still use one of your licences.

Activating subcontracting

If you wish to be either a subcontractor or to subcontract jobs to other LSPs, then the first thing you need to do is to switch on subcontracting in Configuration -> Settings tab.

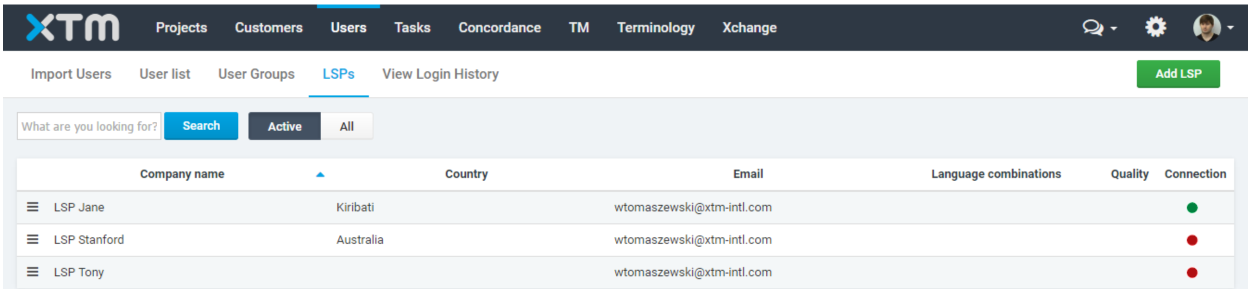


Switching on subcontracting

It is important to note that if you have an XTM Suite installation, and wish to use subcontracting, then you should use an SSL certificate to ensure secure communication over HTTPS and compatibility when connecting the two instances of XTM. If you do not use an SSL certificate the subcontracting feature may not work.

Creating an LSP subcontractor

To create a new LSP account, select the Users tab and then LSPs. Next click the Add button.

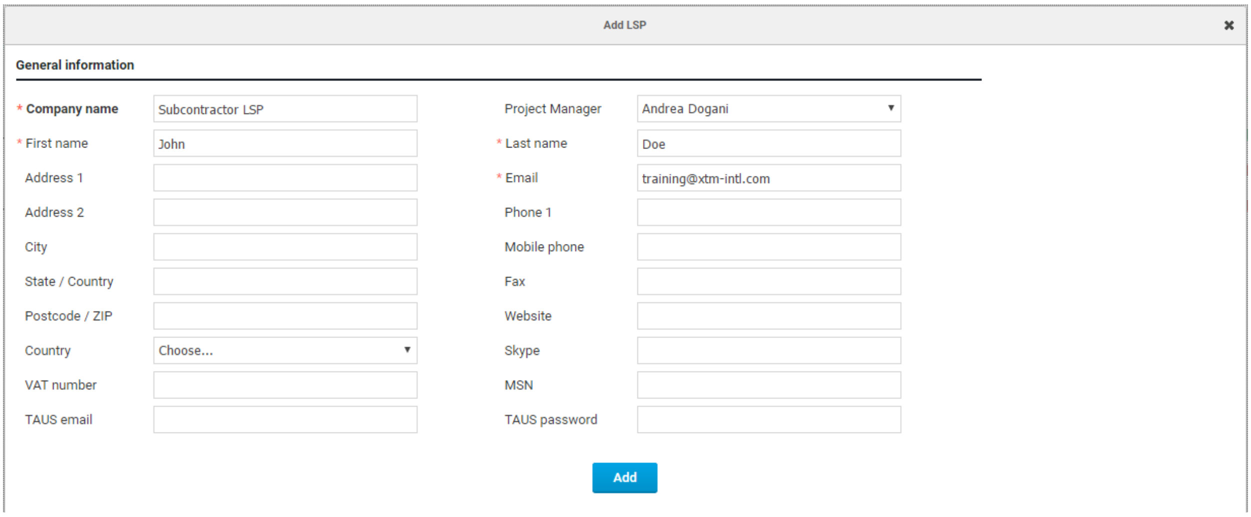


The LSP listing

A pop up appears where you should enter the subcontractor’s company name, contact name and email address. You may also add an additional address, more contact details, credentials to the TAUS DQF or choose a user to be a Dummy user for cost generation, if you wish.

The project manager field allows you to allocate one of your project managers to this LSP. This project manager will then receive all emails, such as status updates, generated by XTM during the project workflow. Also if this LSP allocates tasks to you, these tasks will appear in this project manager’s listing.

If this field is left blank then all your project managers will receive the project emails.

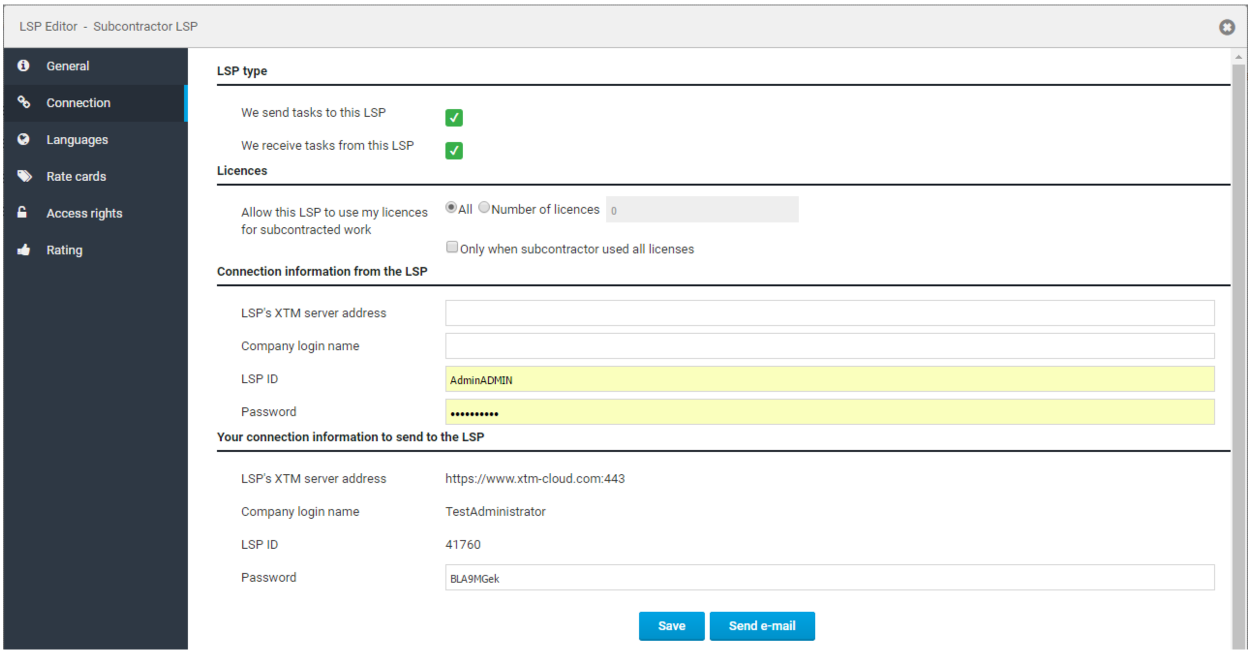


Adding a new LSP

LSP Editor - Connection

When you click the Add button the record is created and you are immediately redirected to the connection tab of the LSP Editor. On this tab there are three sections.

1. LSP Type – this allows you to specify whether you are sending projects to the LSP, and/or whether you will be receiving projects from them. If you check "We send tasks to this LSP" then the LSP will appear in your workflow when you come to allocate resources.
2. Connection information from the LSP specifying their server address, login name, ID and password.
3. Your connection information to send to the LSP. This is generated automatically for you and of the 4 fields you can only edit the password.



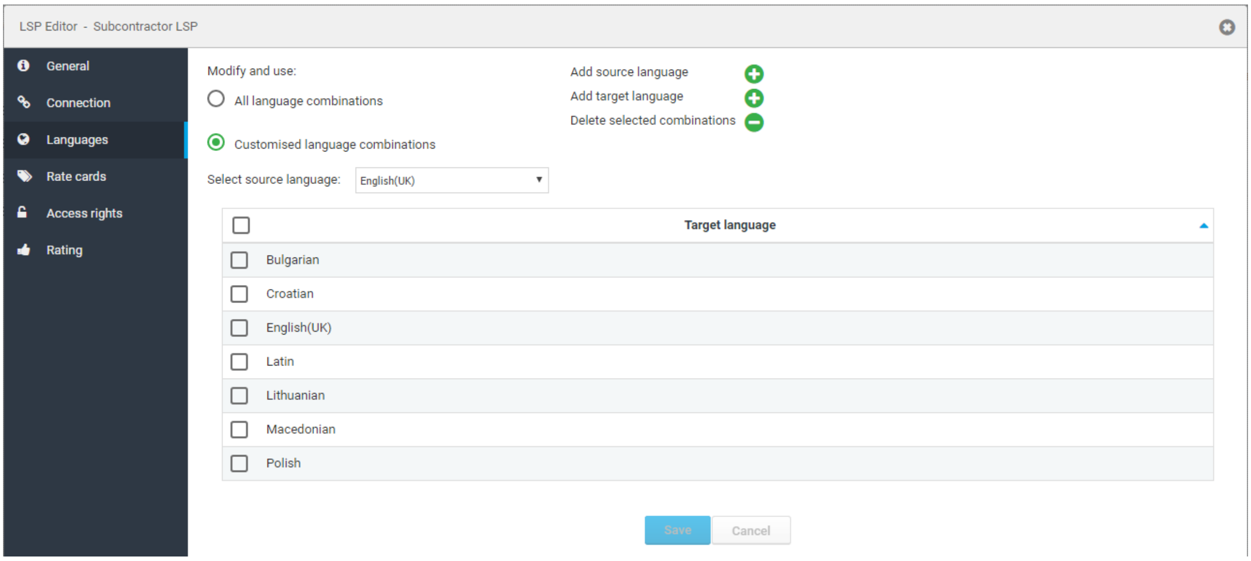
LSP Editor - Connection

Next click send e-mail. This will send your connection details to the subcontractor LSP. When they receive the email the subcontractor will either create a new XTM Cloud account by following information in the email, or using their existing account, they will enter the details in their system. When they click save their details will be automatically completed on your system. They will receive a message if a two-way connection has been established or if there is a problem with the connection.

You can tell when a two-way connection has been established with the Subcontractor LSP by the symbol in the right hand column of the LSP listing. If it is green the connection is good. If it is red the connection information has not been entered or is not correct. You will also receive an automated email when a two-way connection has been established.

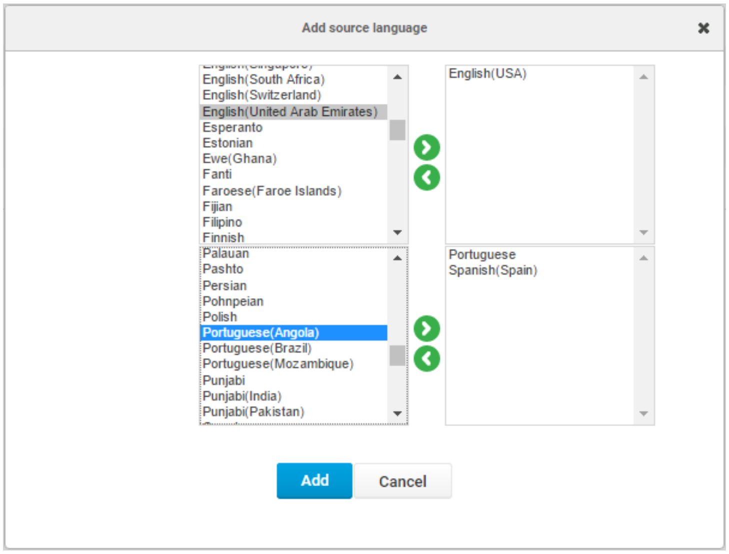
LSP Editor - Languages

By default the subcontractor LSP can process all language pairs. As such the LSP name will always appear when you allocate resources to tasks. If you wish to limit the language pairs then click on the languages tab and create the language pairs by selecting the Customised language combinations button and clicking on the plus symbol next to Add source language. Then double click on the desired source and target languages and click Add.



LSP Editor - Languages

In the window that appears double click on the desired source and target languages and click Add.



LSP Editor – Adding language combinations

LSP Editor - Rate cards

Rate cards: XTM has a highly flexible a rate card function that supports billing in a defined currency

For each rate card you can define

6. The name
7. A description
8. Whether the rate card is active or not
9. One or more language combinations – either single languages or groups
10. One or more subject matters

Then you can define how the cost of the task will be calculated. It can either be based on factors or actual prices. You can also set whether the calculation should be by word or character.

If you choose factors, you must enter a base price which will be multiplied by the percentage values you enter for the different types of match in each step, to work out the cost.

If you use actual prices then you should enter the actual prices for each type of match for each step.

For both types of calculation, you can also define:

3. The number of words per day
4. A minimum charge

Under the General fixed price heading you can set

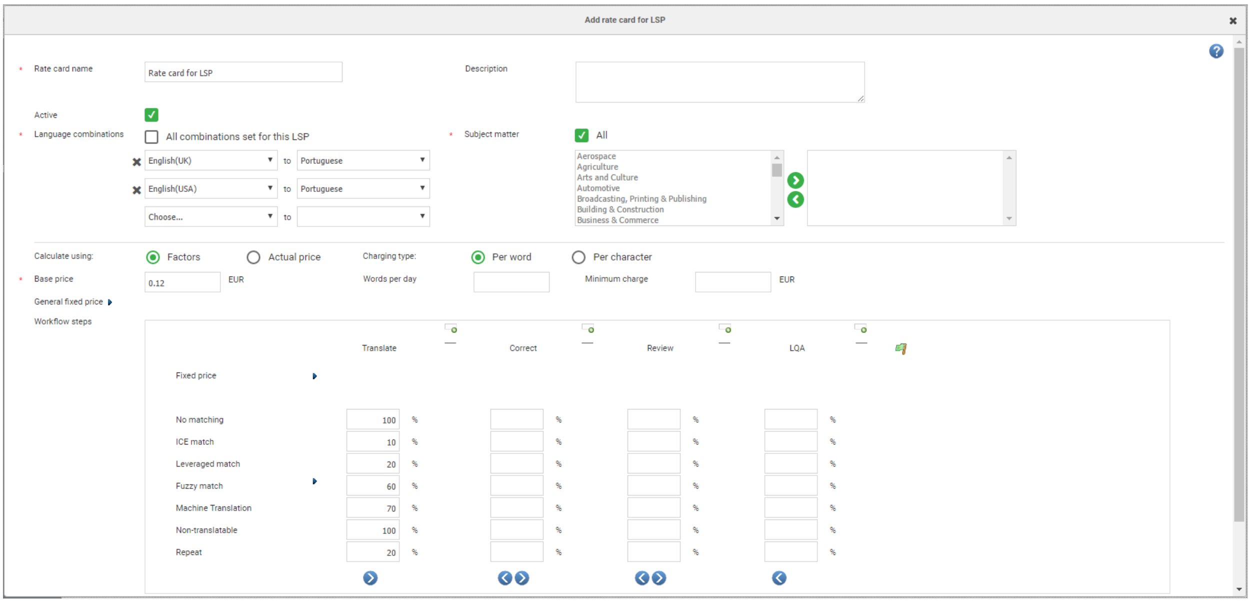
- A fixed price per project
- A fixed price per language,
- A fixed price per file
- A management fee percentage

Then for each workflow step you can define

7. A fixed price project
8. A fixed price language
9. A fixed price file
10. A management fee percentage
11. Minimum charge
12. Price per hour.

The rates for fuzzy matching factors or actual prices can be set as a global figure or individual figures for each band.

You can add or delete additional steps to the workflow by clicking on the or icons and you can copy the values between workflow steps by using the blue arrows near the bottom.
When you have finished entering data in the rate card click the save button.

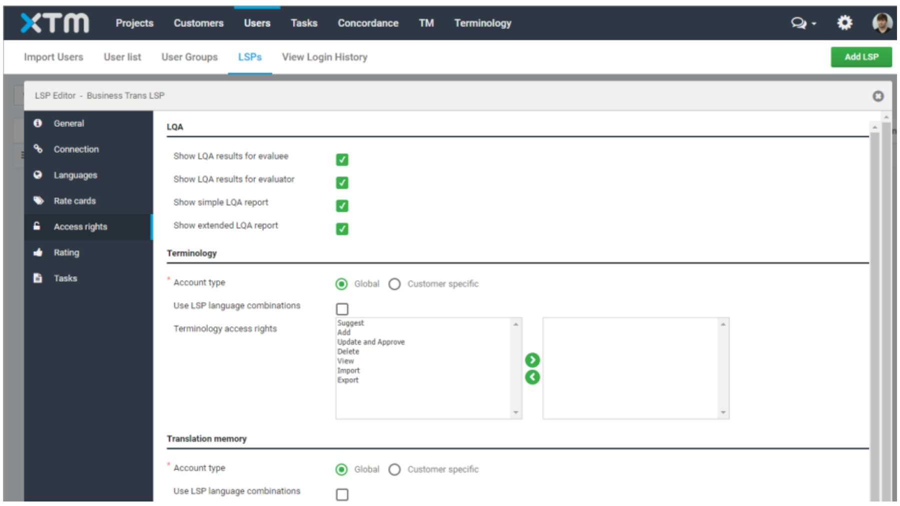


Adding a new user – A rate card

LSP Editor - Access rights

You can also determine the access rights of the subcontractor LSP to LQA results, the TM manager and terminology.

When you give an LSP access rights to show LQA results for an evaluee or evaluator, an additional LSP LQA section is visible on their Projects tab. Depending on their rights, the tab displays projects in which the user was involved as an evaluee, as an evaluator or both sections. Depending on the configuration, the LSP can download simple or extended LQA reports as well.



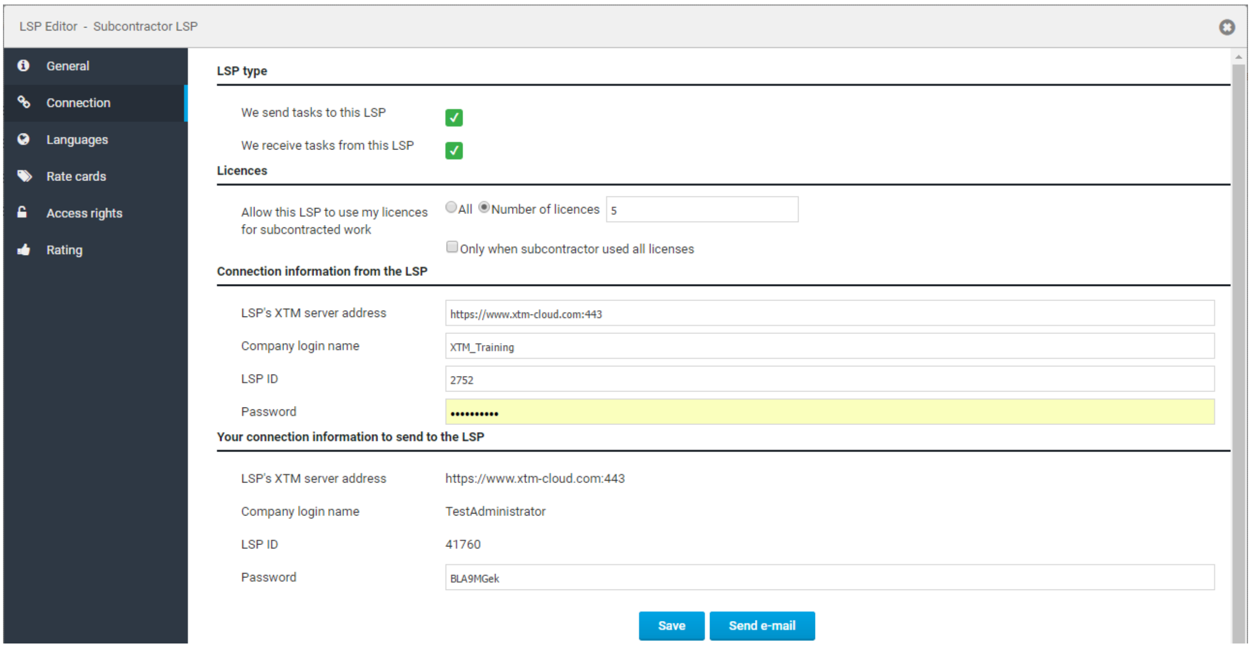
LSP Editor – Access rights

Accepting a request to become an LSP subcontractor

If you plan to work as a subcontractor to an enterprise or LSP, you may have received an email telling you that they would like to connect to you via XTM in order to allocate work to you. If you do not have an XTM account yet you can easily create one by clicking on the link in the email. Fill in the form and click the send button. You will receive an email with your log on details.

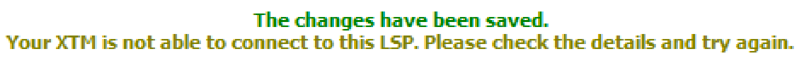
Once you have an account you can set up a connection to their system in the following way:

- Log on to your XTM in the normal way
- Switch on subcontracting in the Configuration -> Settings tab as described above.
- Go to the Users tab and select LSPs
- Add a new LSP, enter the General information about the other system and click Add
- On the connection page enter the details from the email and click Save. You should then receive a message that a two-way connection has been established.



Establishing a two-way connection to an LSP

If for any reason there is a problem making the connection, you will receive the following message.



Licenses for LSPs

Subcontractors can borrow licenses from their contractors. Contractors define the number of licenses allowed to borrow by the subcontractor on the Users tabs > LSPs > Connection, in the Licenses section. Also, contractors can refuse to lend their licenses by entering the zero value into the Number of licences input field or they can decide to lend their licences only when the subcontractor has run out of all their licenses.

Allowing an LSP to use contractor's licenses

Managing subcontracted projects

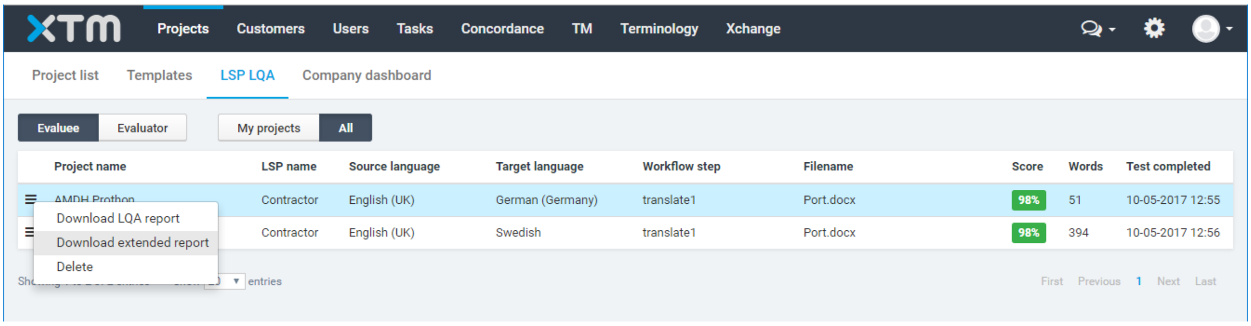
When a project has been assigned to a subcontractor it will automatically appear in the subcontractor's list of projects. It will be given a green star icon in the project listing to indicate that it was created by an LSP. In general, the project can then be managed by the subcontractor in the normal way.

Project naming convention.
By default, the name of the project in the subcontractor system is the same as in the contractor system. The subcontractor may change the name of the project in their system. However, if the contractor then changes the name of the project in their system, both the revised contractor name and the revised subcontractor name will be displayed in the subcontractor system.

Archiving and reactivating subcontracted projects.
A subcontractor can only archive projects that have been archived by the contractor in their system and also a subcontractor can only activate an archived project that is currently active in the contractor's system.

LSP LQA results

Translation provided by LSPs can be evaluated and scored during the contractor's LQA workflow step. LSPs can see percentage scores and download LQA reports for projects completed for contractors provided that these options are enabled in the LSP access rights settings of the contractor's XTM account. The same settings apply to projects where the LSP performed an LQA of translation provided by the contractor's internal resources or vendors.



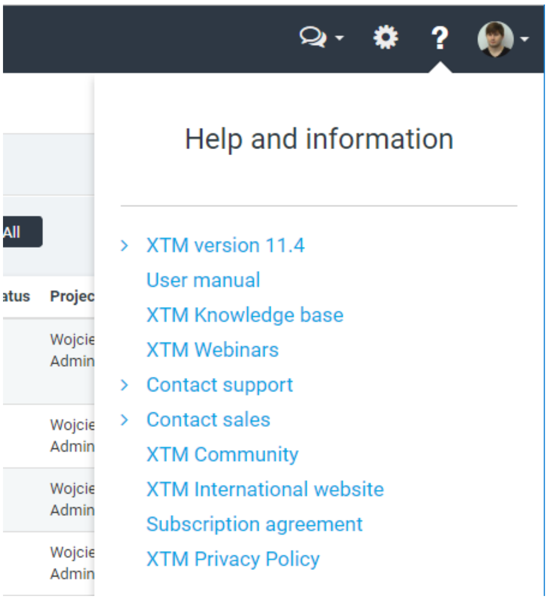
Projects – LSP LQA

4. XTM for Project Managers

Log in as a project manager with the login and password provided by the Administrator.

Help and information

The question mark located between the configuration cog icon and your profile picture opens the Help and information side bar that provides quick access to help resources. It includes a link to XTM User manual, knowledge base How to… articles or XTM webinars. In addition, you can use the XTM Community to get help from your industry peers or contact sales or support. The subscription agreement and XTM Privacy Policy are as well available for reference in the side bar.



Help and information side bar

Customers

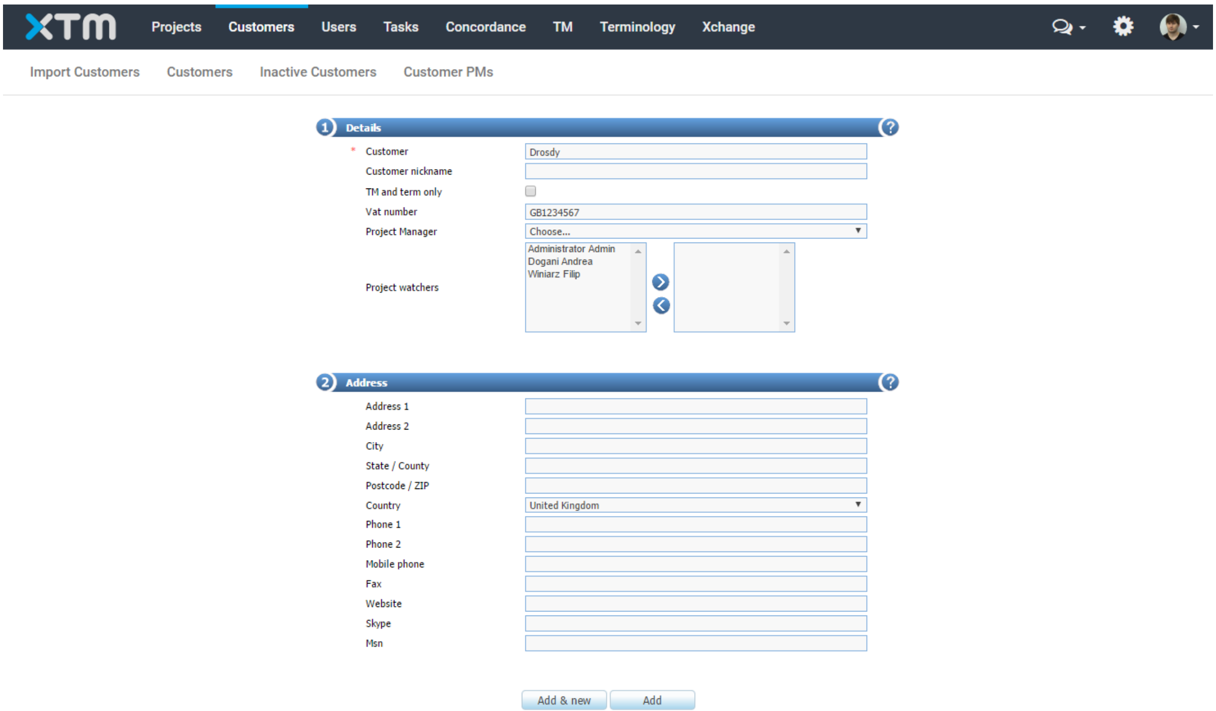
Adding Customers

Firstly, enter Customers by clicking on the Customer tab and entering data in "Add Customer".

The only obligatory data on the screen is the customer's name

You can create a TM and term only customer to act as a dummy customer for importing historic TM and terminology. You will not be able to create projects for this type of customer, but you will be able to apply this TM and terminology to projects created for other customers.

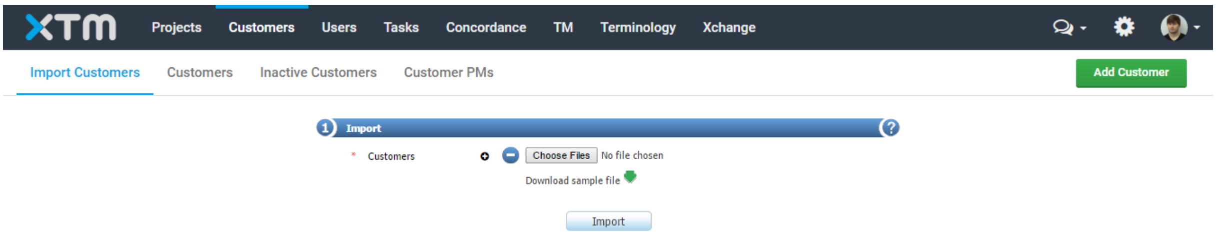
Select a default project manager for the new customer and if other project managers want to receive emails about the progress of their projects then add them as project watchers



The add customer screen

When you have added the customer's address and contact information click the Add button and you will then see the line listing of customers.

Importing Customers



Importing customers

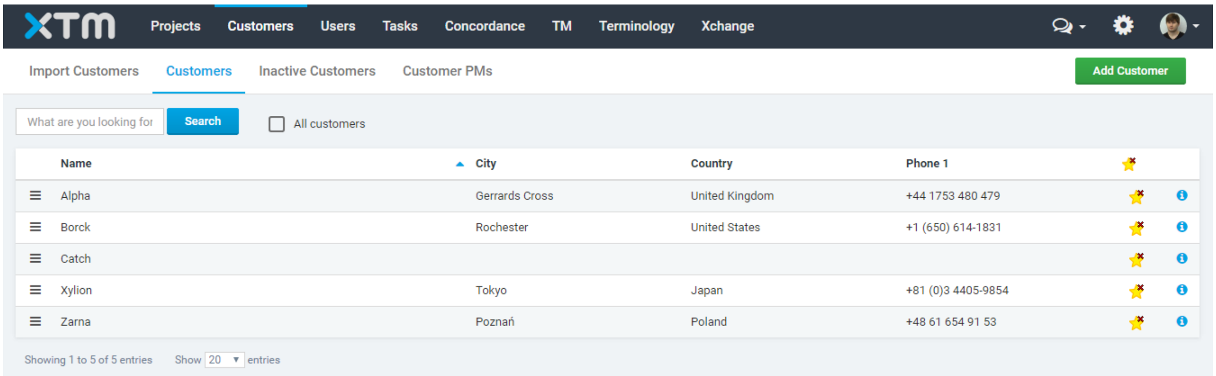
There are two alternatives to importing your existing Customers into XTM.

1) Create an Excel file of your data. Click on the Download sample file green arrow to obtain an Excel template of the right format to import your customers into XTM.
2) Create an XML file of your data. An example of the required XML file is shown in chapter Appendix 4 of this manual. If you require a DTD or schema for the file please contact XTM International Ltd.

Searching for customers

To search for a specific customer, type in the search field and then click the search button. XTM will then search against customer name, city/town, country or phone1. By default XTM searches for and displays customers for whom you are the project manager and customers who do not have an allocated project manager.

If you wish to include customers belonging to all project managers then check the "All customers" check box. The line listing then changes to include the customer's project manager name.

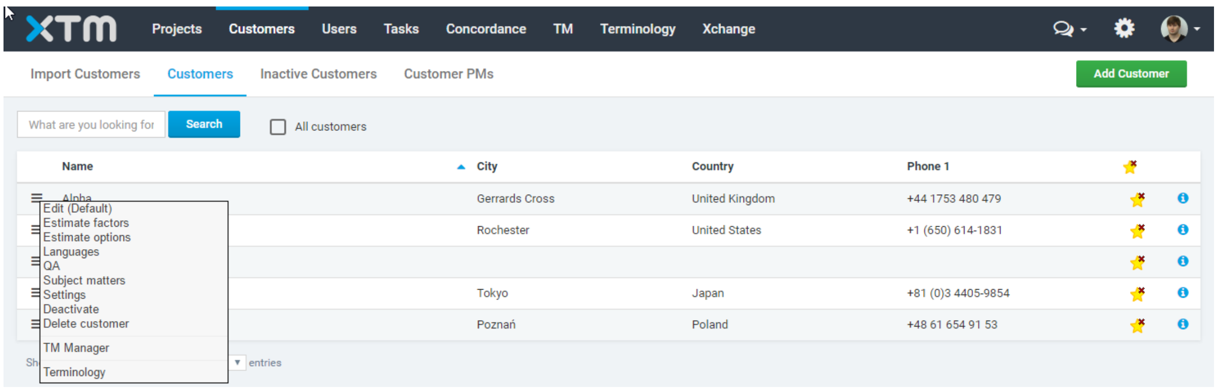


Searching for customer

Reviewing Customers

When you click on the customers tab you see a list of all the active customers in the system. To modify a customer's record click the customer name in the list. Clicking on the menu icon in the first column brings up a context sensitive menu which enables you to:

- Enter or edit
  - Customer details
  - Customer estimate factors
  - Subject matter factors
  - Language combinations
  - Translation settings
- Deactivate. Deactivating a customer allows you to restore the customer at a later date from the Inactive Customer list.
- Delete the customer
- View TM Manager for the customer
- View Terminology manager for the customer



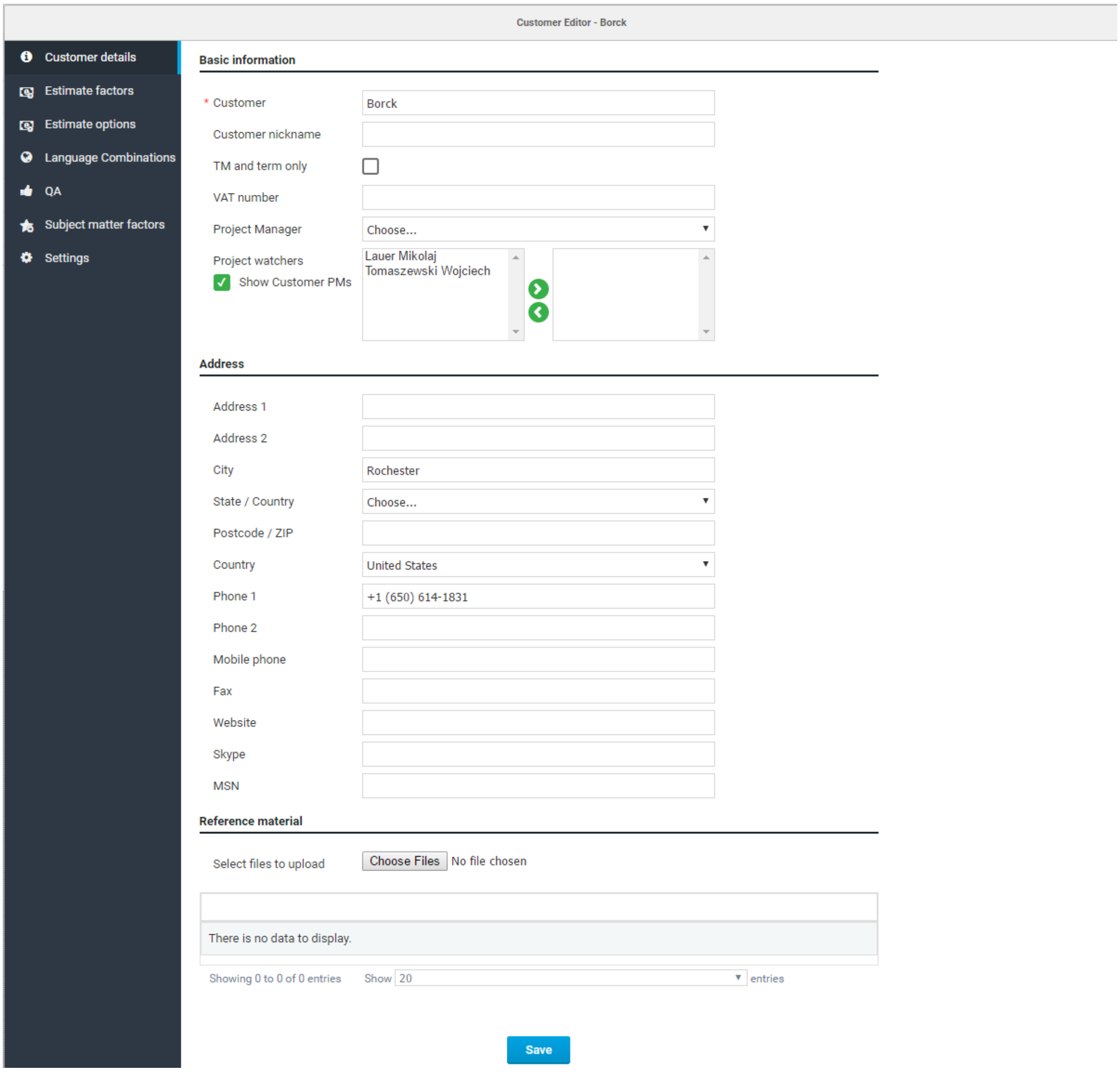
Context sensitive menu for customers

You can sort the customer list by clicking on any of the column headers.

Editing Customers

Customer Editor - Customer details

Using this tab you can edit the customer details.



Editing a customer's details

A project watcher is a project manager who is not in charge of the project, but wishes to receive all the emails relating to the project. You may include Customer PMs in the list if you want to cc them on the system emails.

Reference material that is customer specific, rather than project specific, maybe stored here. This reference material will then be available for all projects for that customer.

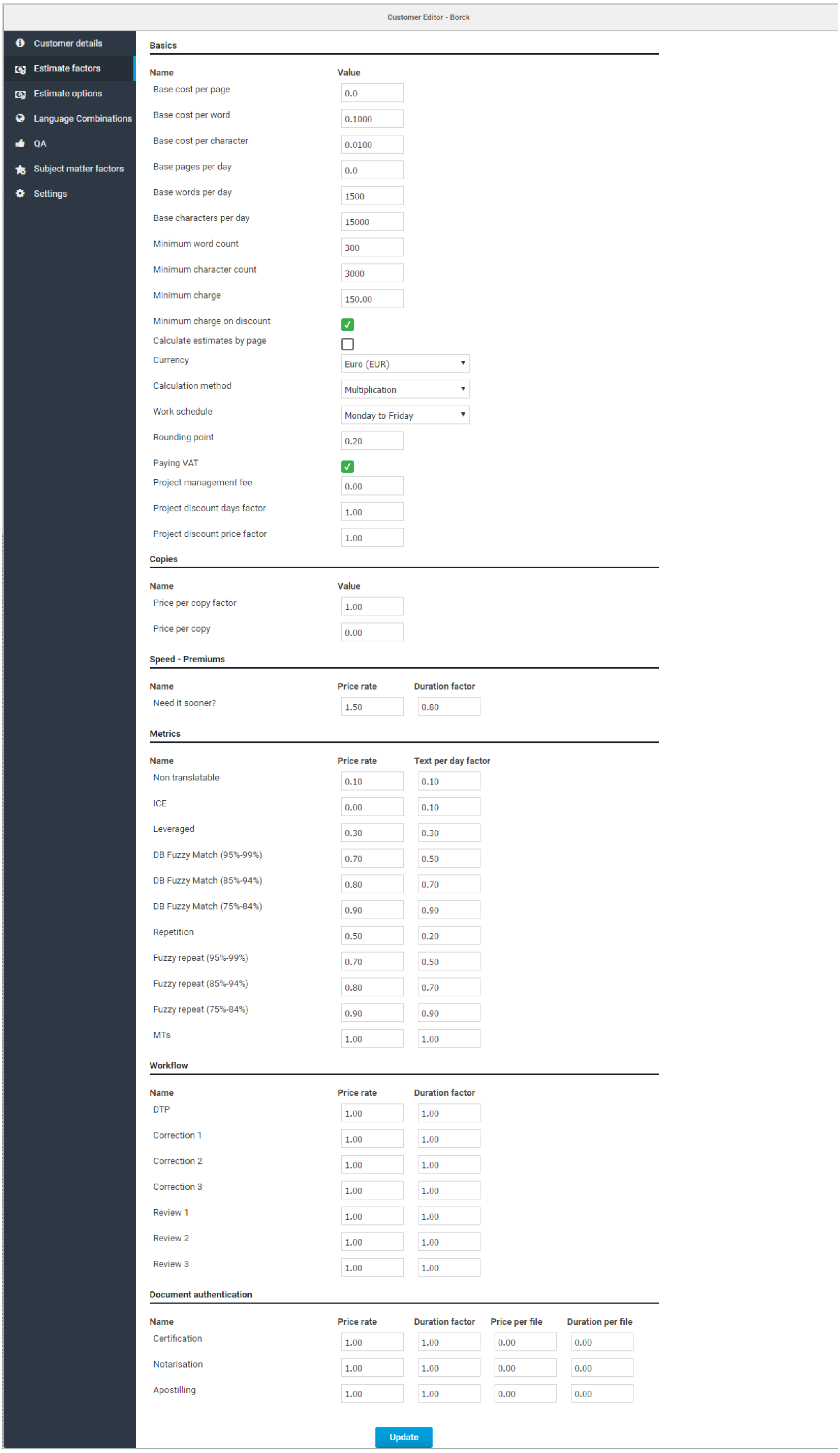
Customer Editor - Estimate factors

Using this tab you can set the factors that are used to automatically calculate the cost and duration estimates for the customer. The factors are:

- Base cost per page
- Base cost per word
- Base cost per character
- Base words per day
- Base characters per day
- Minimum word count
- Minimum character count

- Minimum charge
- Minimum charge on discount
- Use estimates per page
- Currency
- Calculation method
- Work Schedule
- Paying VAT
- Project discount days factor
- Project discount price factor
- Factors for the number of copies
- Speed factors – Discounts. There are three levels which become progressively slower and cheaper
- Speed factors – Premiums. There are three levels which become progressively faster and more expensive.
- Metrics factors for all the different types of matching.
- Price and duration factors for additional steps in the workflow
- Actual price or factors for document authentication

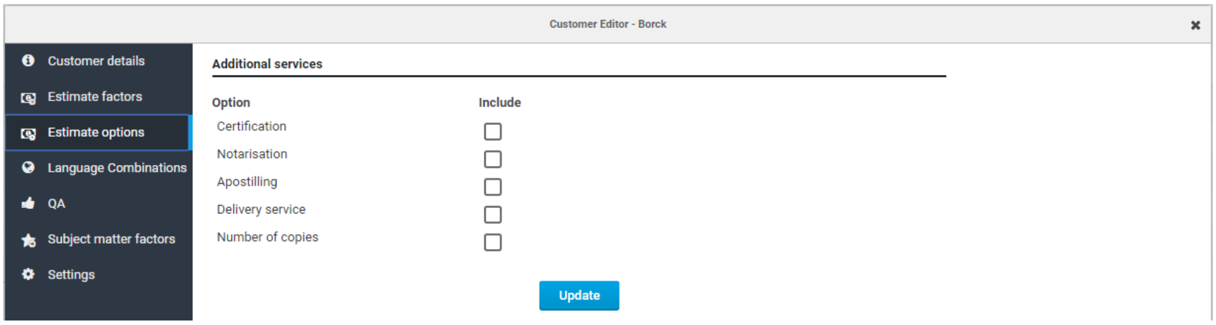
For more information about the estimate factors please see Estimates under Project Editor



Estimate factors for a customer

Customer Editor - Estimate options

If you have the XTM portal then you can choose to display a number of additional services for each customer



Customising estimate options

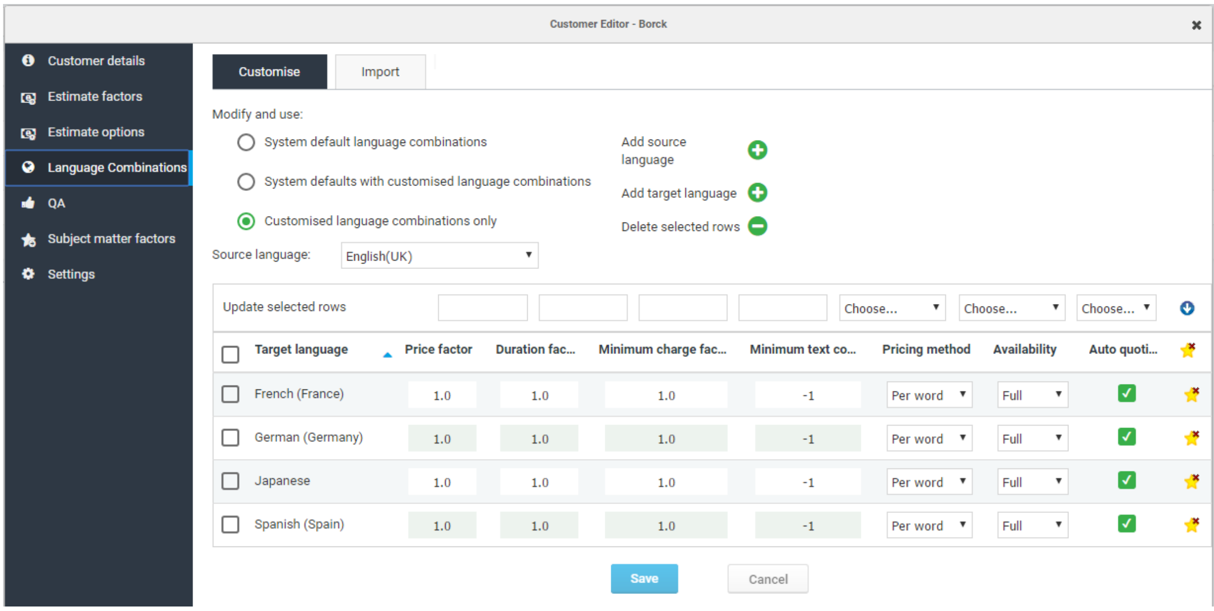
Customer Editor - Language combinations

Your Administrator can set and customise the system default language combinations that you offer your customers.

Customise tab

On the Customise tab there are three options for you to modify and use language combinations,

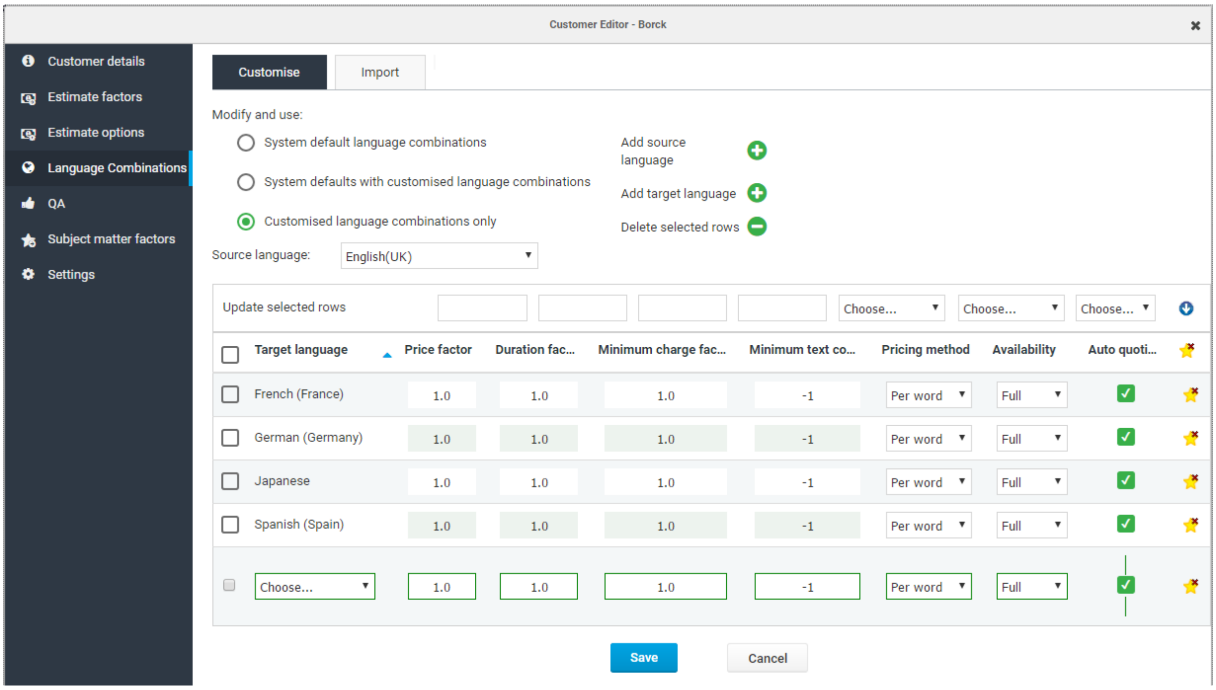
1. “System default language combinations”. This is the set of language combinations defined by the administrator.
2. “System defaults with customised language combinations”. This is the set of language combinations defined by the administrator in which you may have customised some parameters for the customer.
3. “Customised language combinations only”. This is only those language combinations that you have customised for this customer



Customising language combinations

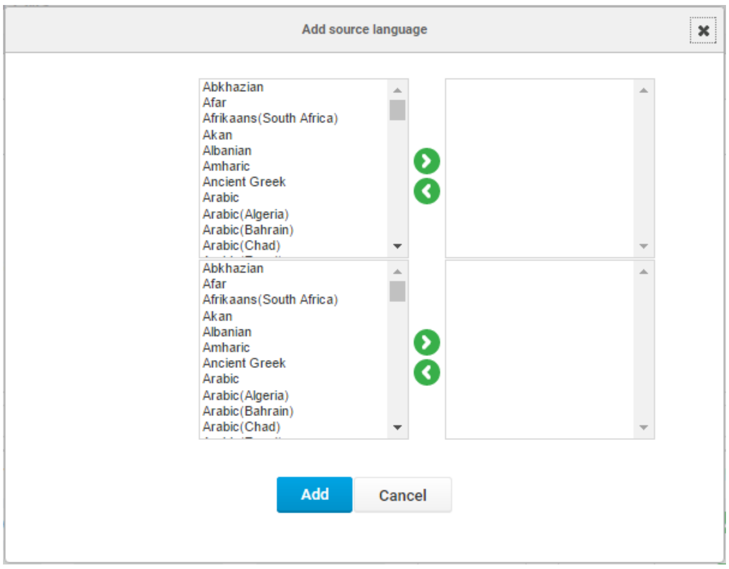
When you have selected one of the customised options it is possible to add and delete source and target languages.

To add a target language to an existing source language, firstly select the source language from the drop down list. Next click on the Add target language button and a new line will appear at the bottom of the target language listing. Select a target language from the pull down list and edit the factors if required.



Adding a target language

To add a new source language and the corresponding target languages click on the Add source language button and the following window will appear. You may select multiple source and target languages and XTM will create all the possible language combinations.



Adding a source languages with their respective target languages

To delete language combinations select the row to delete by checking the box in the left hand column and then click the delete selected rows button.

The lower section on this page enables you to edit the factors used for creating estimates for each language combination. In this location customising the factors sets the default values for the entire system.

You can change:

- **Price factor** – The base price is multiplied by the price factor so if it is 1 (the default) the price doesn't change, if it's greater than 1 the price is increased and if it's lower than 1 then the price is decreased.

- **Duration factor** - Similar to the price factor but this changes the duration of the translation process and has an impact on the delivery date.

- **The minimum charge factor** -The customer "minimum charge" is multiplied by "minimum charge factor" to increase the minimum charge (>1), decrease (<1) or just leave as it is (=1).

- **The minimum text count** (either words or characters) The default value can be overwritten by specifying any value >= 0 in that parameter. -1 means that the default should be taken.

- **Pricing method** If you charge by character count rather than word count then set this here. Use the character count for languages such as Japanese and Chinese.

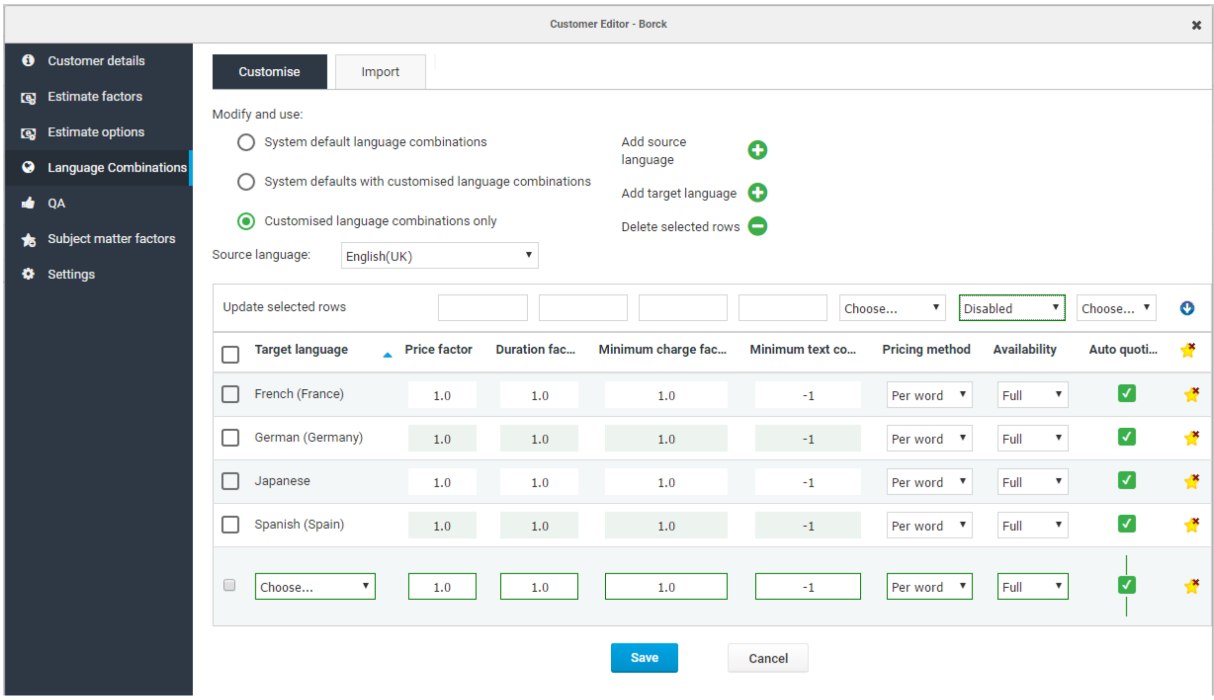
- **Availability** There are three available alternatives:
    - Full – This language combination is available to customers and PMs
    - PM only – Only project managers can create projects with this language combination.
    - Unavailable - You do not offer this language combination.

- **Auto quoting** This field allows you to distinguish between commonly used language combinations that your agency can start translating immediately (auto quoted) and language combinations where you need to contact linguists first and you cannot predict the price or the delivery time (non-auto quoted).

-  This column displays how the language combination has been defined. A yellow star indicates that the combination has been defined for the entire system and no star means that the system is using default settings.

Changing the factor in each cell determines how the automatic quotation is produced. The last column “Auto quotation” determines whether the customer can receive the quotation automatically from the system or whether they are directed to speak to a project manager.

The Update selected rows section enables you to change a number of target language settings at one time. To do this firstly select the desired languages by checking the box in the left hand column, then enter the settings in the row labelled “Update selected rows” and then click the down arrow “apply update”



Using the update selected rows feature

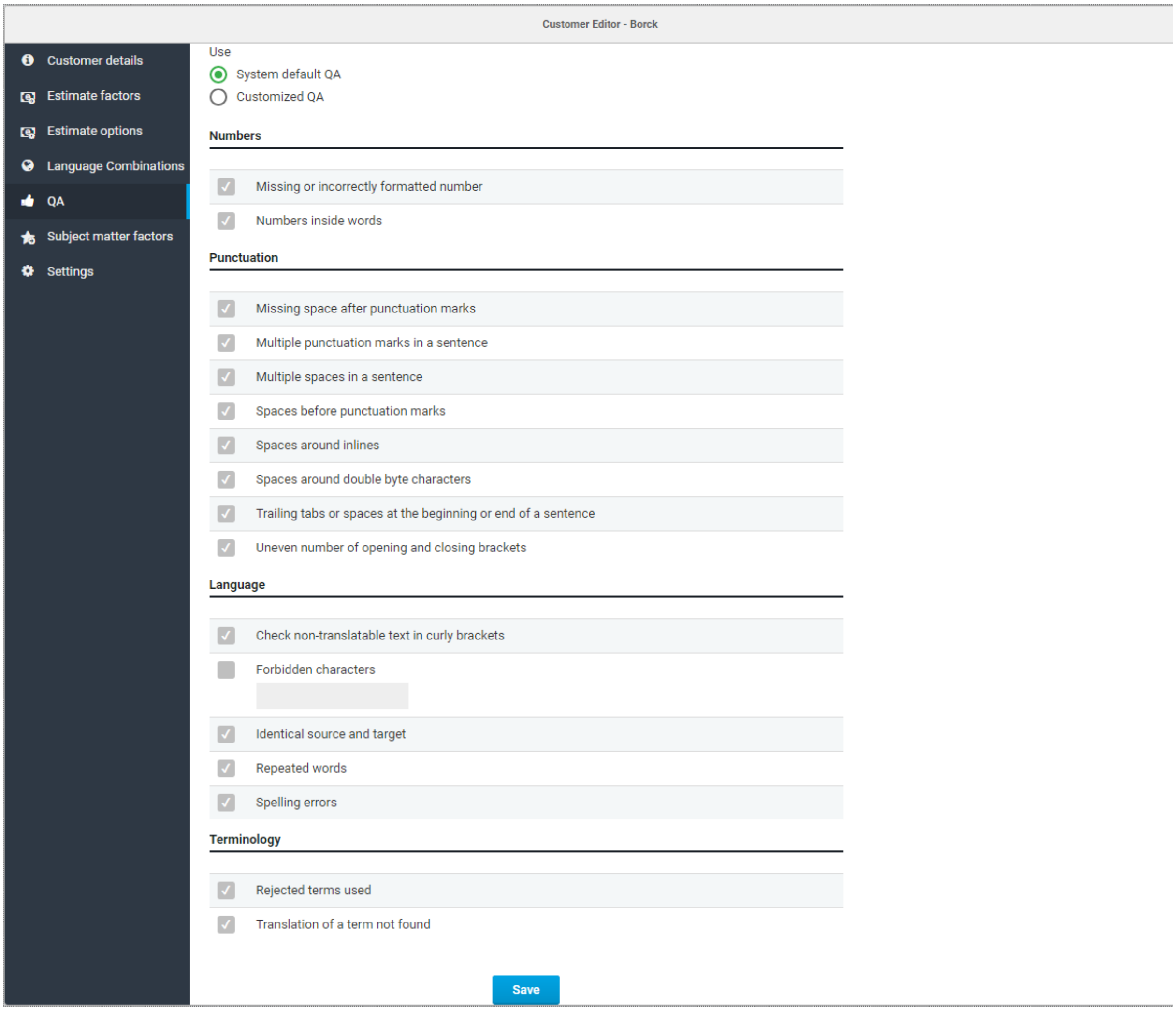
Import tab

On the import tab you have the facility to upload an XML file with the required language combinations. You may download example files by clicking on the green button. You can use these files as they are, or alternatively use them as templates and modify them according to your requirements. Additionally there is an example of a template is shown in Appendix 2 at the end of this manual. When the files are ready upload them to XTM by browsing to the file and clicking the import button.

If you click the remove the existing language combinations the existing language combinations will be cleared and the new ones created. If the check box is not clicked then any new language combinations will be added to the existing ones.

Customer Editor - QA

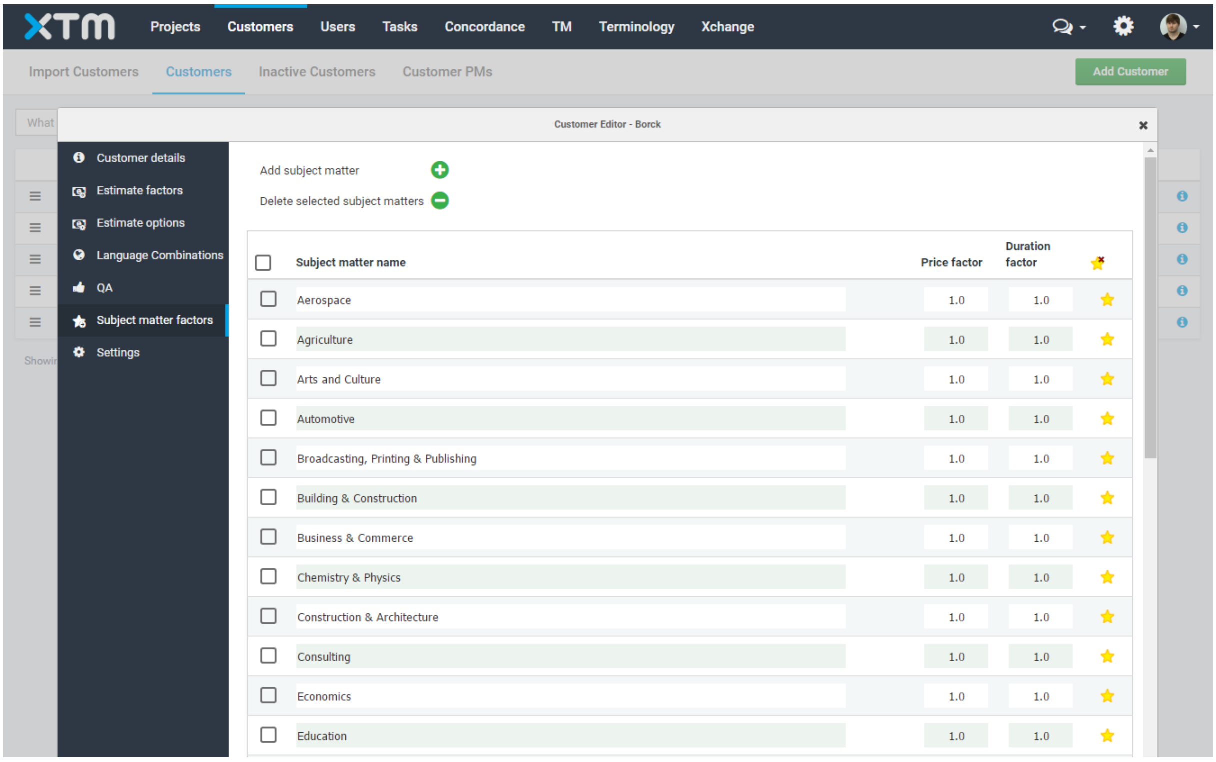
The QA tab allows you to set which QA tests should be performed for this customer.



Setting the QA options for a customer

Customer Editor - Subject matter factors

The subject matter factors tab enables you to customise your list of source material subject matters that appears when you create a project. By adjusting the relevant factor you are able to alter the price estimate and project duration that is automatically calculated by XTM.



Customising subject matters

Customer Editor - Settings

The following sections can be displayed in the Settings tab:

- Project Options
- Translation
- Joining files in sets
- Segment status
- Text formatting
- Workflow
- Machine translation
- Quality
- Terminology
- Source file preview
- Purchase order settings
- TAUS DQF

The visibility and default values for these options cascade down from the system, which are set by the administrator under Configuration > Translation and this page allows you to customise the system setting for each customer.

Project options: Check the Alternative translation box if you want to modify the default setting for this customer. Then enter the number of alternatives that you want to display in XTM Editor. Check the Use Anonymization box if you want to mask sensitive data in translation projects with a placeholder.

All of the settings available in the Customer Editor are described in detail in the Settings -

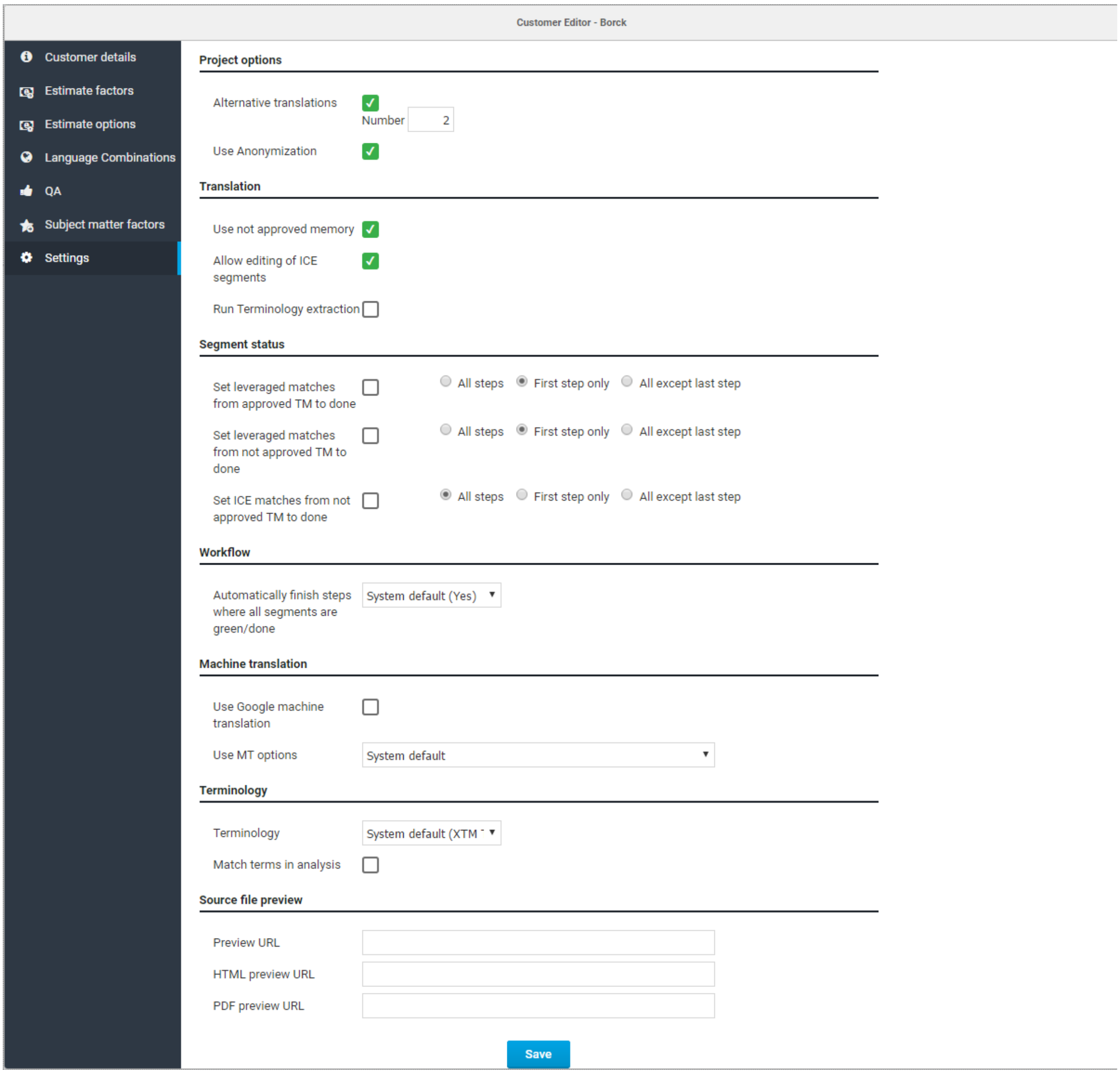
Translation section of this manual. Source file preview: This is where you can enter the URL of an external system that will allow linguists to preview the source file while working on the translation.

The 3 fields allow you to enter a URL in the form of http://your_server.com or https://your_server.com To activate this feature you need to create a service with the capability to server content based on parameters sent by XTM.

XTM automatically sends the following parameters to the service:

- fileName
- srcLang
- tgtLang
- projectName
- projectId

The file name is composed of the file path + file name. If the source file was uploaded as one or more single files then the file name will simply be the file name. If however the source file was uploaded as a number of files in a directory structure as a zip file, then the file name is composed of the file path plus the file name.



Translation settings for a customer.

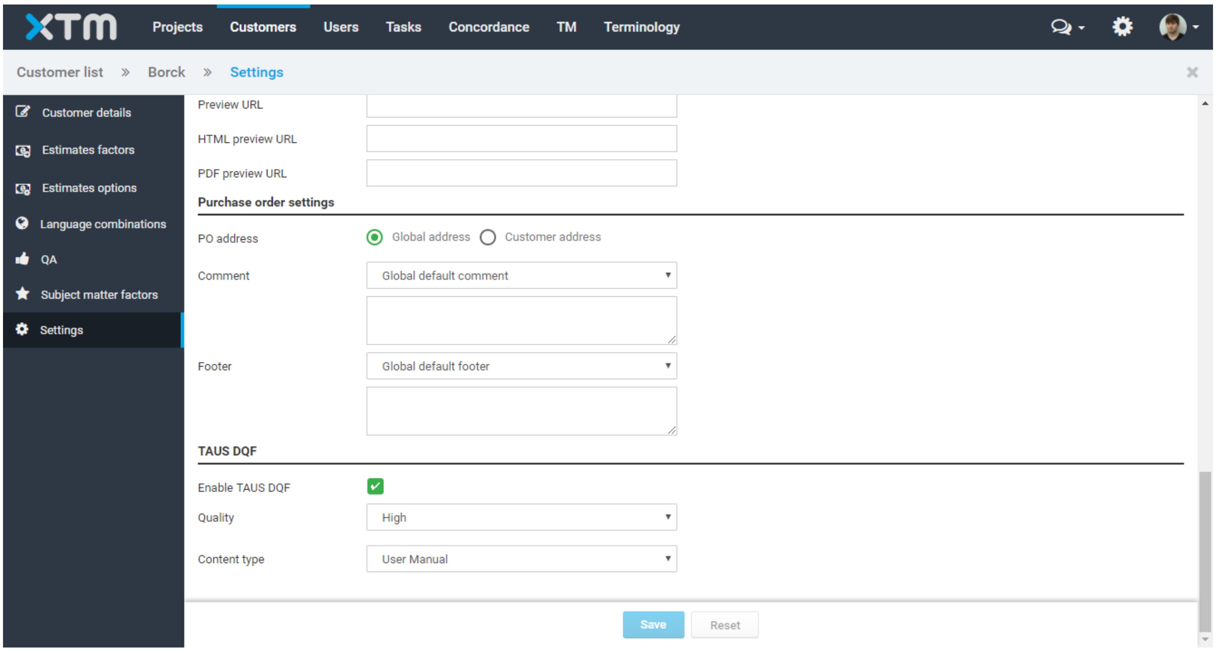
Integration with the TAUS DQF

You can configure XTM to connect with the TAUS DQF (Dynamic Quality Framework) to track translation productivity and quality. The options to enable TAUS are available in the XTM configuration. If you enabled TAUS before creating a TAUS account, you can access the data collected since then.

Create an account with TAUS at www.taus.net before you enable it in XTM. You can subscribe to the TAUS DQF straight from XTM. You can find the links under:

- Configuration > User Details
- Users > User editor > General

When a user creates a TAUS project in XTM, a new master project is created in the TAUS Quality Dashboard. During translation XTM sends to TAUS translation units consisting of the source, target and the edited translation text after the segment is confirmed by the user in XTM Editor.



Customer specific TAUS configuration

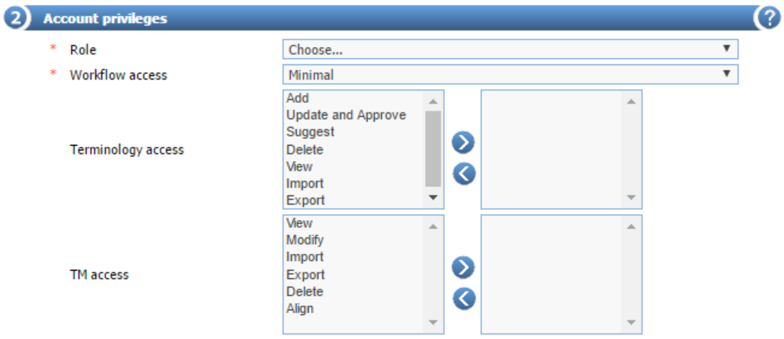
Configuration of TAUS account in XTM

- Users can have their own TAUS accounts set up by Project Managers or Administrators on the Users tab > User list > Edit User > General.
- Users can provide their individual TAUS account details on the Configuration tab (the cog icon) on the User Details tab.

Adding a customer project manager

From the Customers tab click on Add CustomerPM and fill in the fields.

In section 2 you can set the access rights of the customer PM.



Section 2 of Adding a customer PM

The Role field determines whether or not the customer PM can make any changes to a project.

- A manager can make changes to information on the general tab but not to the workflow.
- A viewer cannot make any changes at all

The Workflow access field has 3 options:

- Minimal – Only displays information about the minimum status of the file. No information at the bundle level is available.
- Standard – Displays the status of each bundle.
- Trusted – Displays each step of workflow. However the names of the linguists are not visible. The customer PM can also open the editor in view only mode.
- Trusted with Editor access – This is the same as Trusted but with write access to the Editor.

The Terminology access section allows you to select the terminology functionality you wish to give the Customer PM.

At section 4 select the customer and whether the person is the primary contact for the customer.

Section 4 of Adding a customer PM

Users

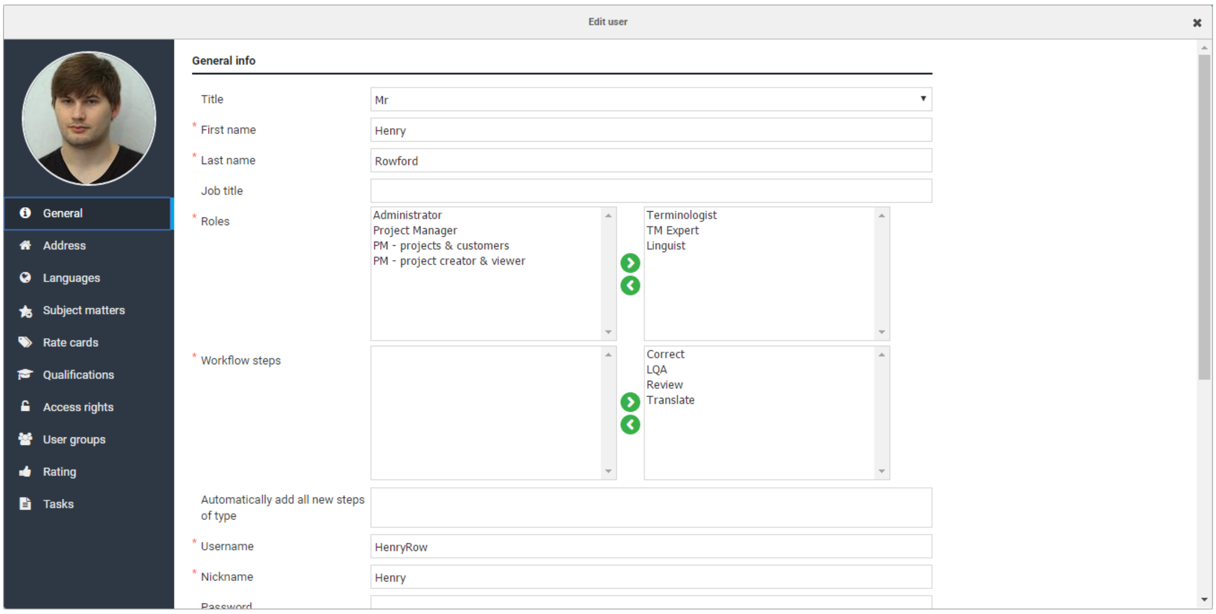
Adding users

An administrator can add and edit users with all roles including additional administrators. A project manager can add and edit users with all roles except administrators. Users with other roles cannot add or edit additional users; they can only edit their own details.

To add users to your system, click on the users tab and then from the user listing click the Add user button. Initially enter the general information about the user. Obligatory information is marked with a red star. The role field allows you to determine the type of user. Select the roles that you want this user to perform. If you select linguist as a role, you can then in the box below select in which workflow steps the linguist can participate.

When you click save you will be taken to other tabs to complete.

User Editor - General

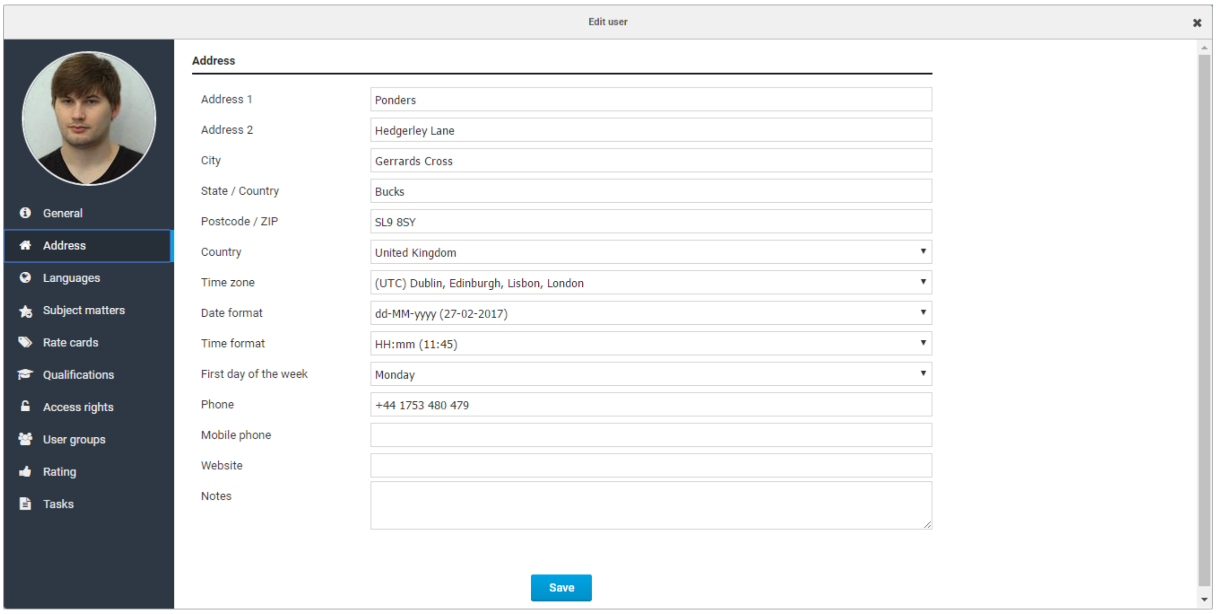


Users – General info

If the user is a linguist, then you can check an option “Dummy user for cost generation”. This will add this user to a list of users whose rate cards can be used to calculate projects costs in which there are steps where no linguist has been assigned.

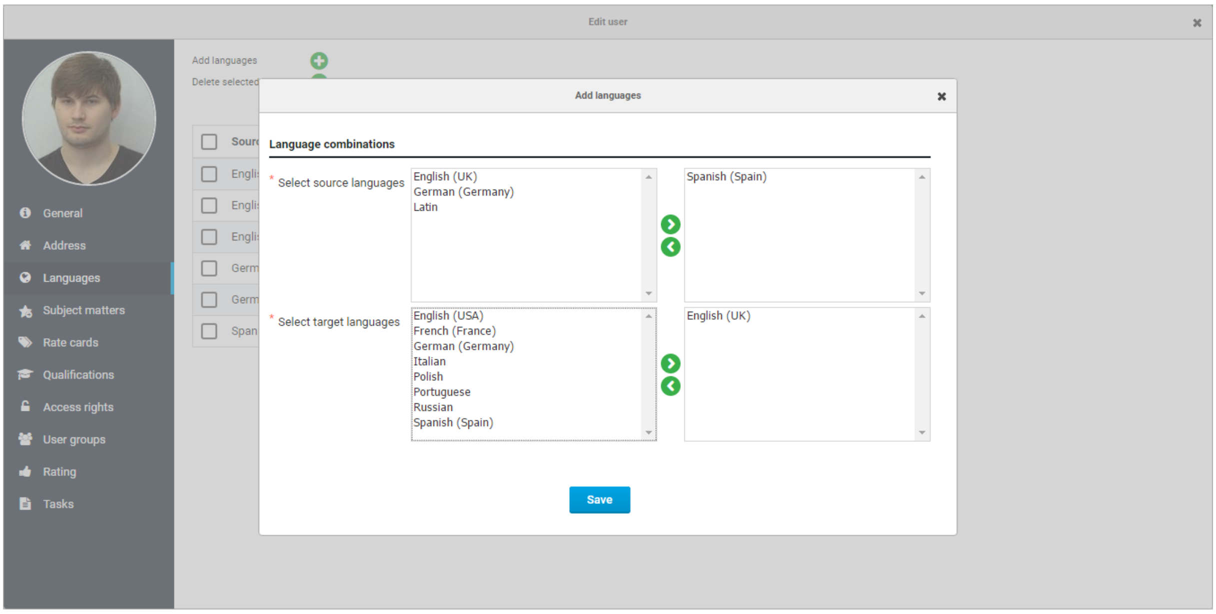
Depending on the roles that you selected, further tabs appear on the left hand side. These options are described below.

User Editor - Address: Enter the user’s address and other contact details.



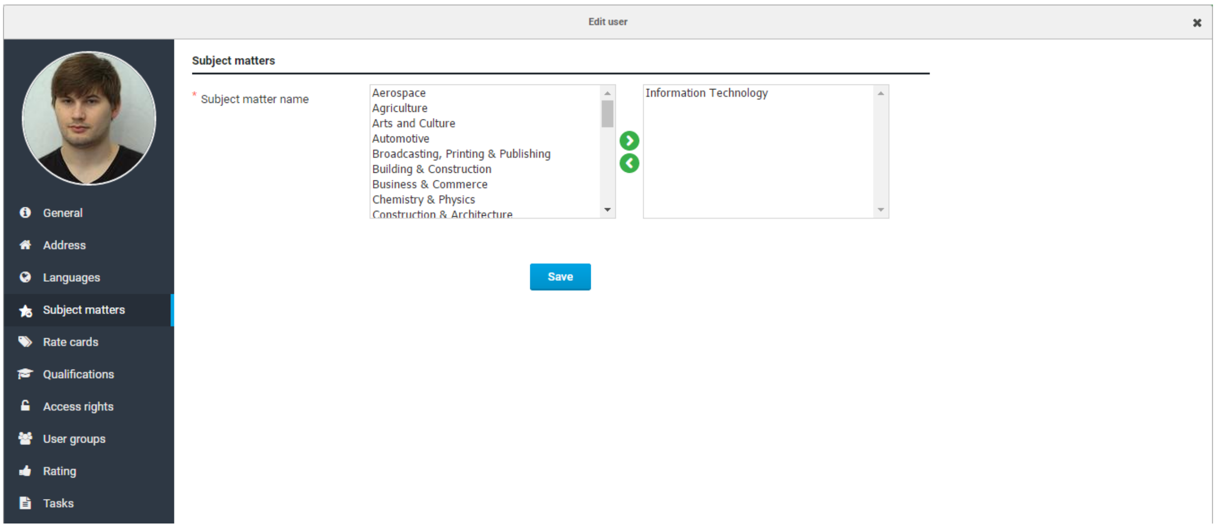
Users - Address

User Editor - Languages: If the user is a linguist then you need to define the languages that they can process. Click on the Add languages button, select the relevant source and target languages and click Save



Users – Languages

User Editor - Subject matters: Then select the subject matters in which the user has expertise.



Users – Subject matters

User Editor - Rate cards: XTM has a highly flexible rate card function that supports billing in a defined currency

For each rate card you can define:

- The name to identify the rate card
- A description of the pricing and usage for the rate card
- Whether the rate card is active or not
- One or more language combinations – either single languages or groups
- One or more subject matters

Then you can define how the cost of the task will be calculated. It can either be based on factors or actual prices. You can also set whether the calculation should be by word or character.

If you choose factors, you must enter a base price which will be multiplied by the percentage values you enter for the different types of match in each step, to work out the cost.

If you use actual prices then you should enter the actual prices for each type of match for each step.

For both types of calculation you can also define:

- The number of words per day
- A minimum charge

Under the General fixed price heading you can set

- A fixed price per project
- A fixed price per language,
- A fixed price per file
- A management fee percentage

Then for each workflow step you can define

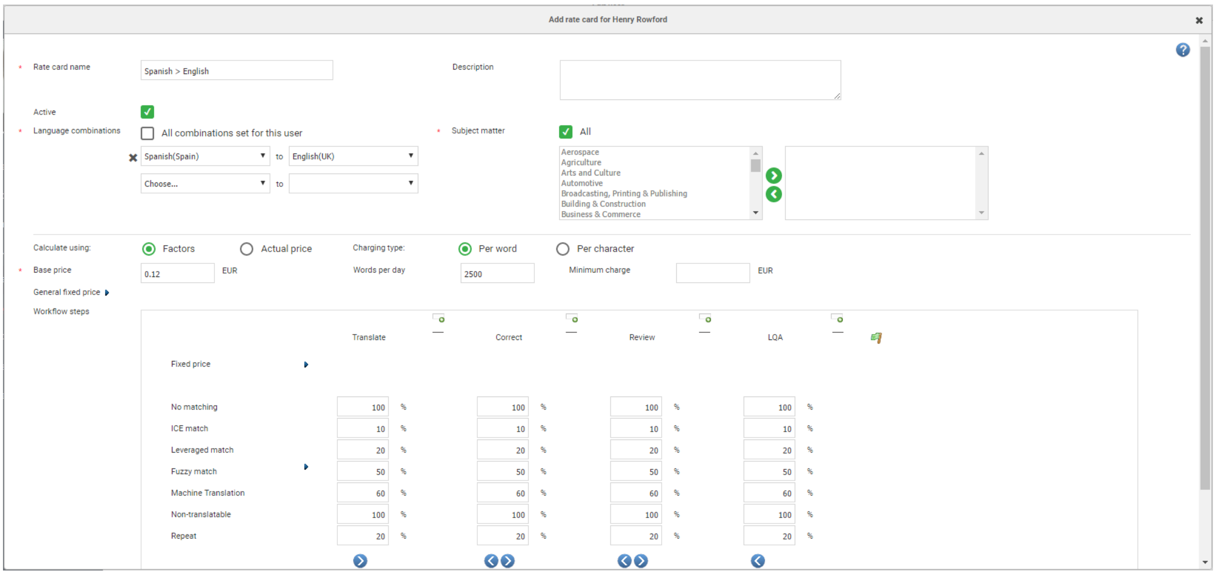
- A fixed price project
- A fixed price language
- A fixed price file
- A management fee percentage
- Rush job premium –A rush job premium percentage
- Minimum charge

Price per hour.

The rates for fuzzy matching factors or actual prices can be set as a global figure or individual figures for each band.

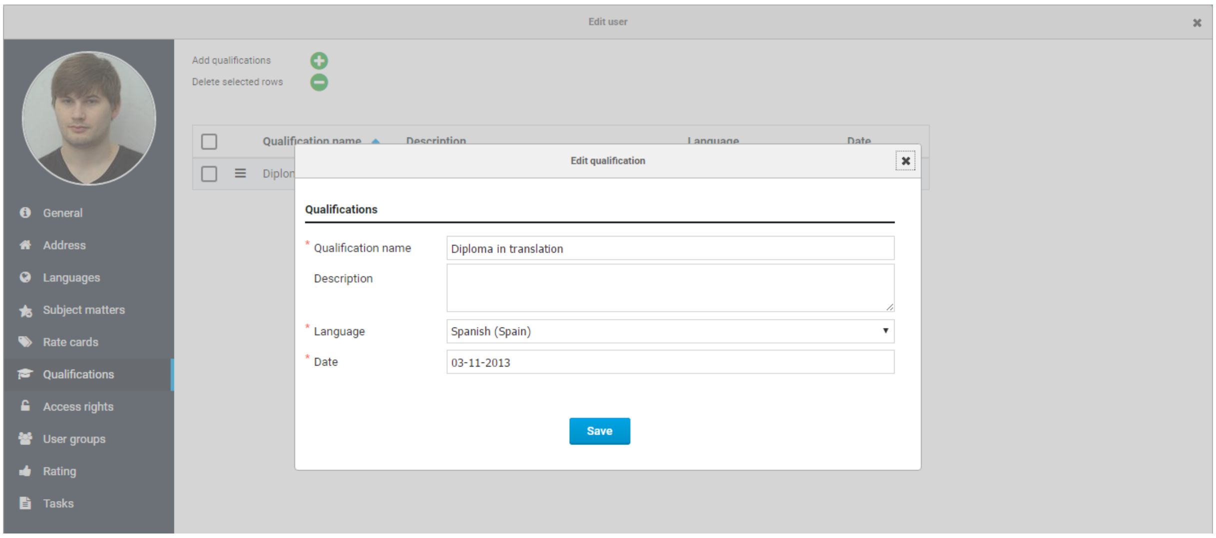
You can add or delete additional steps to the workflow by clicking on the or icons and you can copy the values between workflow steps by using the blue arrows near the bottom.

When you have finished entering data in the rate card click the save button.



Users – A rate card

User Editor - Qualifications: Enter the qualifications of the user.



Users – Qualifications

User Editor - Access rights: If you give a user a role other than Administrator, the Access rights tab will appear. This tab allows you to define what the user can do in these areas.

Customers

If you do not specify a customer, then the user will be available to work on projects for all customers. When a user has access to all customers, they will also get access to newly created customers. When some customers have been selected from the list, the user will have access only to the selection. In such case, the user will not see projects for any newly created customers.

Projects
By selecting the “Only show this user's projects” option you can restrict the user from seeing projects created by other people.

Editor
Choose whether the user can lock and unlock segments, only unlock them or has no locking rights. Decide if the user can display metrics in the XTM Editor.

LQA
When you give a user access rights to show LQA results for an evaluee or evaluator, an additional LQA section is visible on their Tasks tab. Depending on their rights, the tab displays projects in which the user was involved as an evaluee, as an evaluator or both sections.

Terminology and Translation Memory
For TM and Terminology: There are two account types:

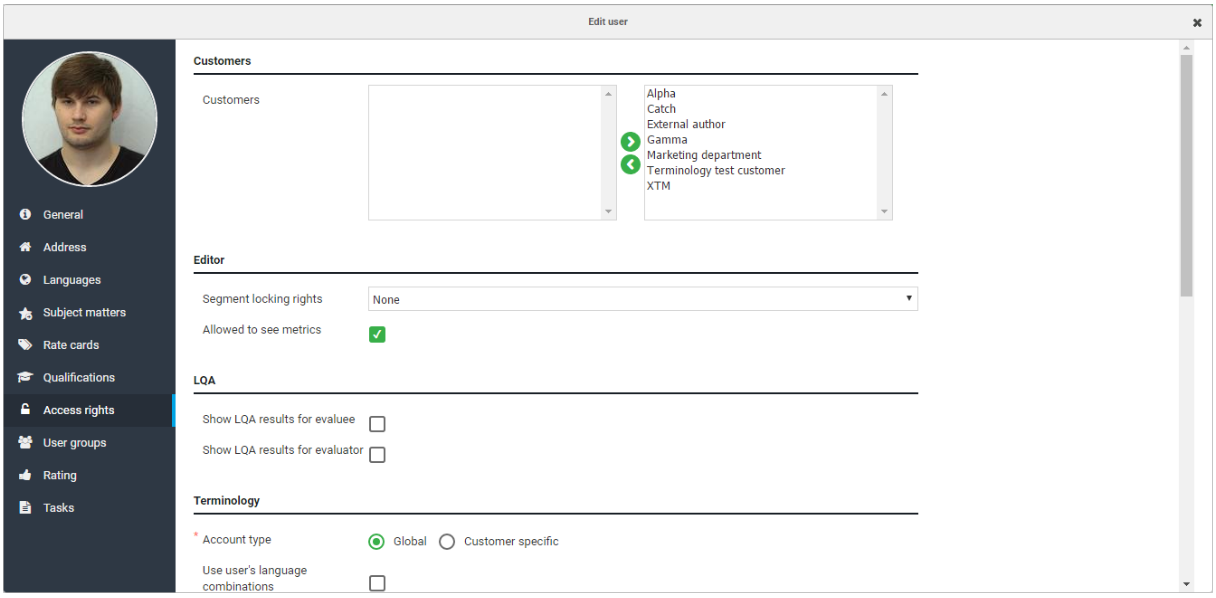
3) Customer specific. This account type can only access the TM and terminology of the selected customers. When this option is selected, choose the required customers in the multi-select box
4) Global expert. This account type can access all the TM and terminology in the system for all customers.

You are also able to limit the user’s access to TM and Terminology to the user’s language combinations by checking the available box.

For terminology you can determine if the users can modify, import, export, view and add terms and for TM you can determine if the users can modify, import, export and view TM.

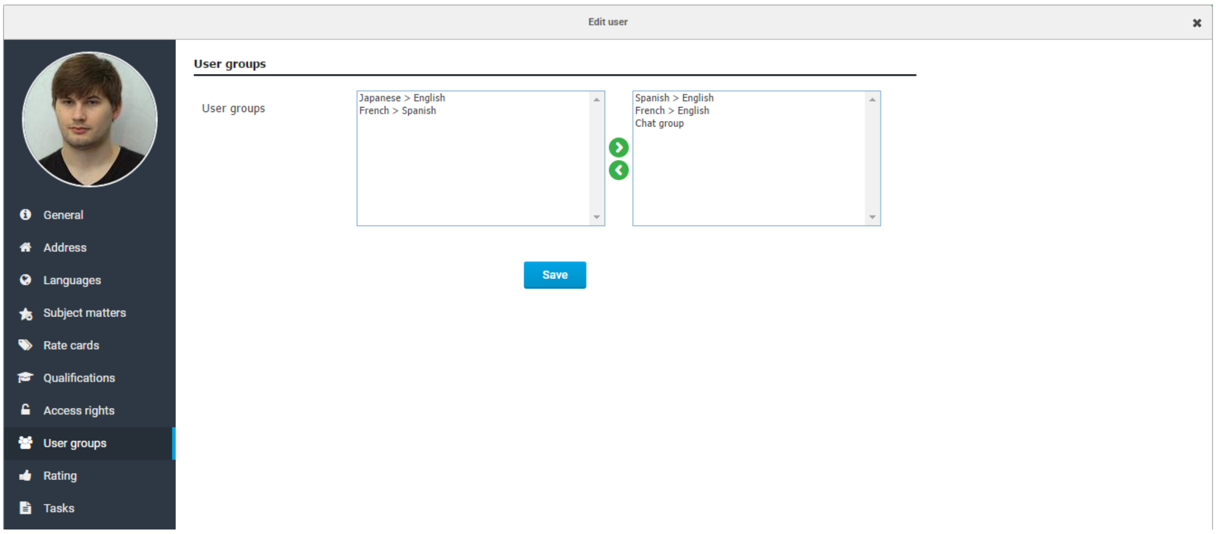
Concordance
Access to TM meta data and Concordance: You can set XTM to use the system’s global settings for the user or you can define the user’s rights separately. The options are:

- Use global settings
- Full access
- Access with customer details
- Access without customer or project details
- No access



Users – Access rights

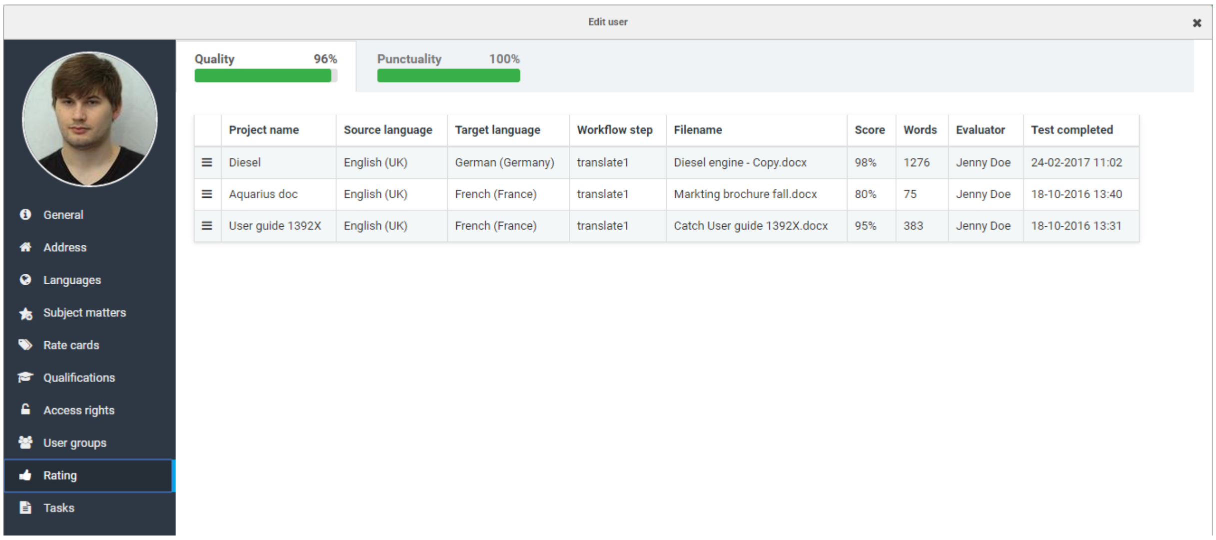
User Editor - User groups: If you want to add the user to a user group select the User groups tab and then double click on the desired user group in the left hand box.



Users – User groups

User Editor - Rating: The rating section consists of two tabs.

The Quality tab displays the Linguistic Quality Assessment (LQA) results for the linguist. Results are collected from LQAs that are performed in the workflow step after the step to which the linguist was assigned. LQA results are stored for linguists only when the option “Yes, save result in user record” was selected from the LQA dropdown list in Edit Workflow window.

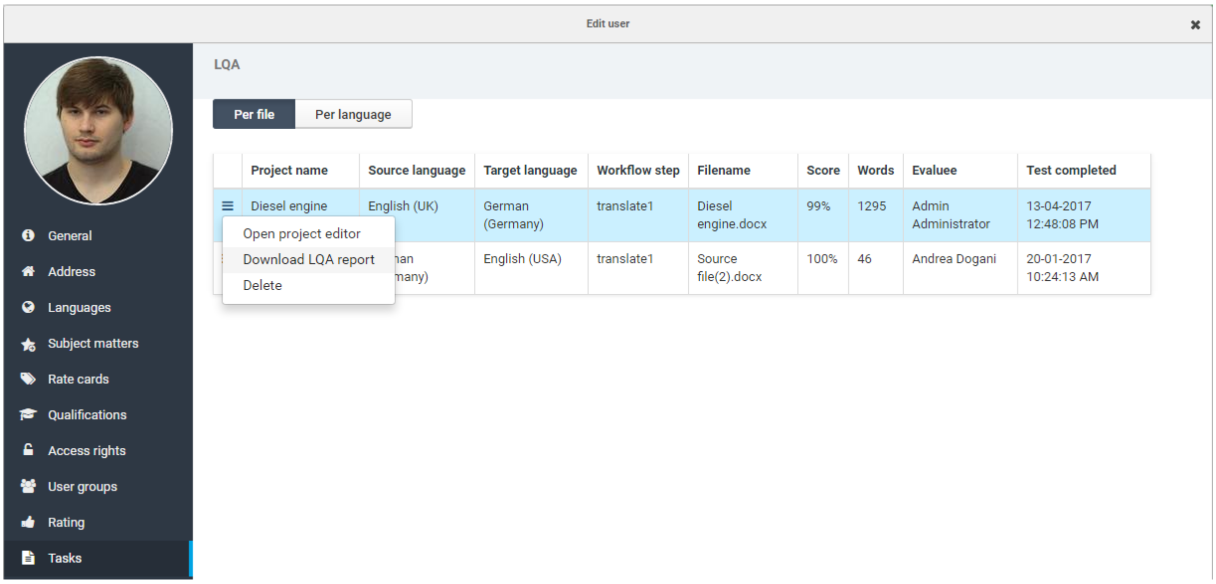


Linguist LQA results

The Punctuality tab displays the timeliness of deliveries by a specific linguist expressed as a percentage value. XTM automatically verifies when a project has been finished on each workflow step and calculates the average score.

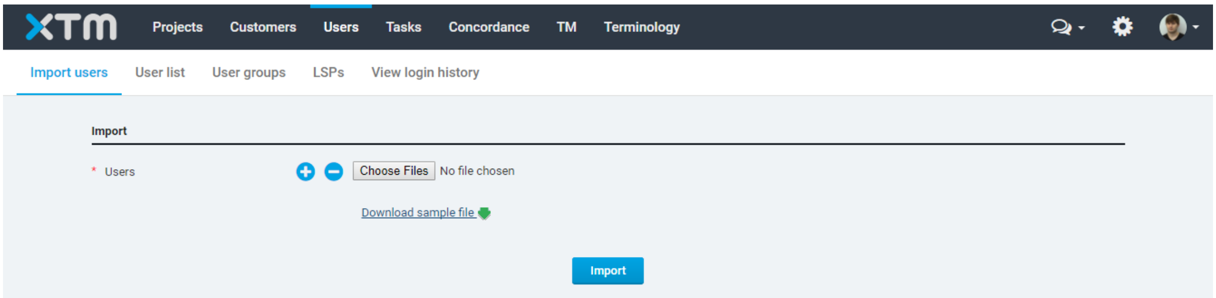
The data displayed on this screen provides information about the average quality and punctuality scores as well as quality scores for each project separately. To view the list of projects delivered on time or late you can switch to the Punctuality tab. Project Managers can check linguist scores and project details to see if a linguist is a good choice for the task at hand.

User Editor - Tasks: This tab lists the LQAs performed by the user. Project Managers can open the Project Editor, download the LQA report or delete it from the list.



Users – Tasks

Importing Linguists



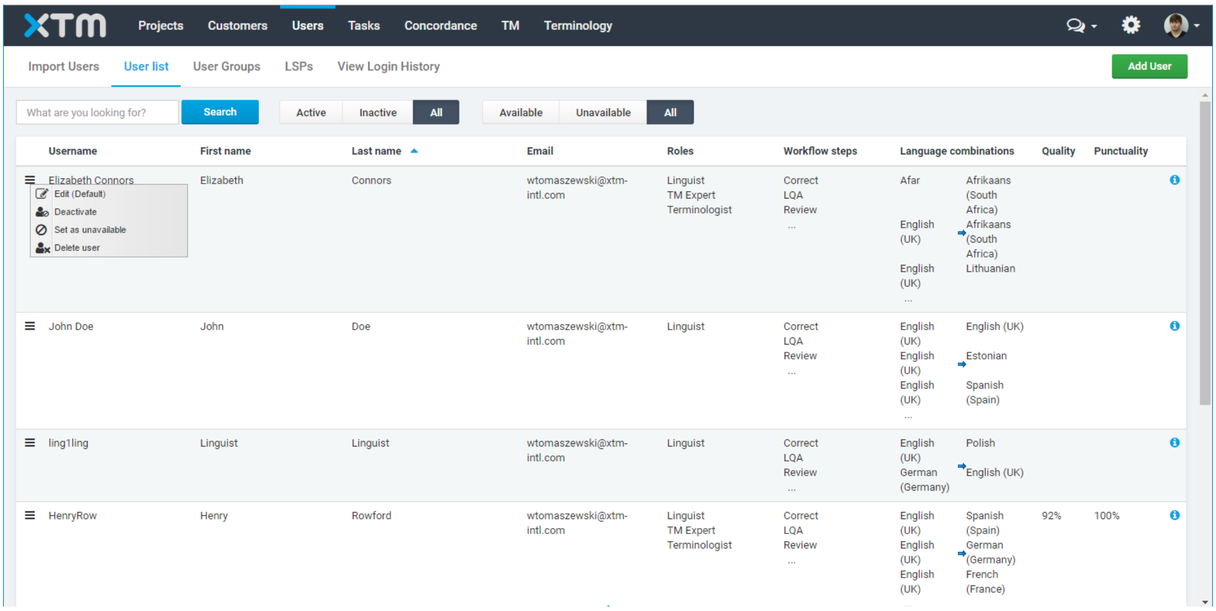
Importing linguists

If you have a list of translators and reviewers in another computer system, we recommend that you export the list into a Microsoft Excel file, ensure the formatting is correct and then import this file into XTM. Click on the green arrow to download a template of the Excel file. The specification for the file is shown in Appendix 4.

Reviewing Users

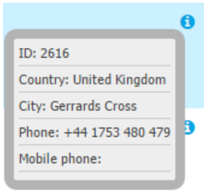
You can view all linguists in the Users tab by clicking on "Users". To modify a record double click on the name. Clicking on the icon in the first column or right clicking on a User brings up a context menu. From the context menu it is possible to:

- Edit a user
- Activate/Deactivate a user to prevent them from logging in and performing any action in XTM or to restore their privileges. When a user is deactivated they are unassigned from their current projects, cannot be assigned to new projects, do not receive email notifications and cannot be found in the advanced search.
- Set as unavailable/available to highlight that the user is busy, on holiday or sick etc. and will not be involved in any new projects until they are available again.
- Unblock a user that has been automatically deactivated by the system for being inactive for too long.
- Delete a user



Context menu for linguists

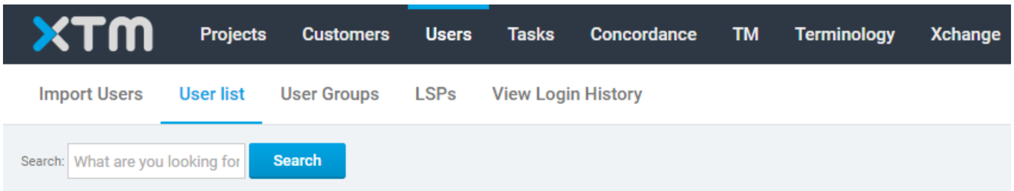
Clicking on the icon in the last column displays further information about the user



Popup information box about each user

Searching for Users

To search for a specific user type in the search field and then click the search button. XTM will then search against username, first name, last name, email address.



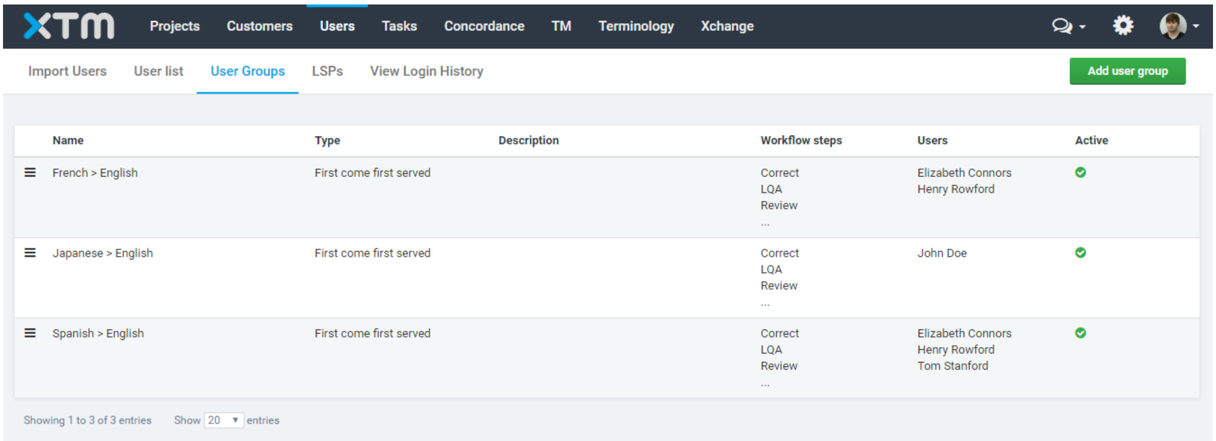
Searching for linguists

User Groups

XTM allows you to create the following types of user group: First come first served, Allocation order and Chat. The first come first served and allocation order user groups can be assigned to tasks in the workflow. For First come first served groups all group members will receive an email advising them that a new task is available. A user can then accept the task which will be recorded by XTM, while informing the other group members that the task is no longer available. For Allocation order groups, an email is initially sent to the first member of the group. The linguist can accept or reject the task. If it is rejected the next person in the group will receive the email and so on until a linguist accepts the task.

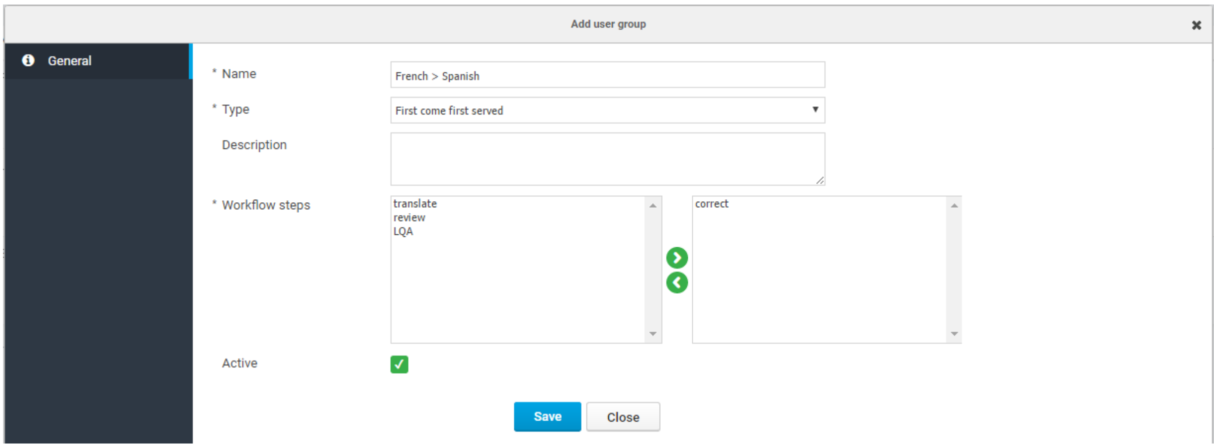
A Chat user group cannot be assigned to tasks in the workflow, but can be added to any chat opened using the XTM Messenger Choose chat participants… option regardless of stakeholders assigned to the project.

Clicking on the User Groups tab brings up a list of the existing user groups.



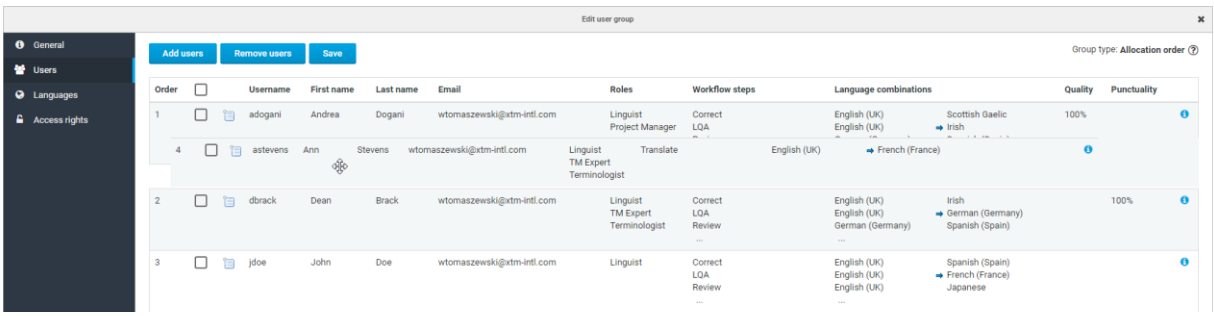
List of user groups

To add a new user group click on the add button and enter the details.



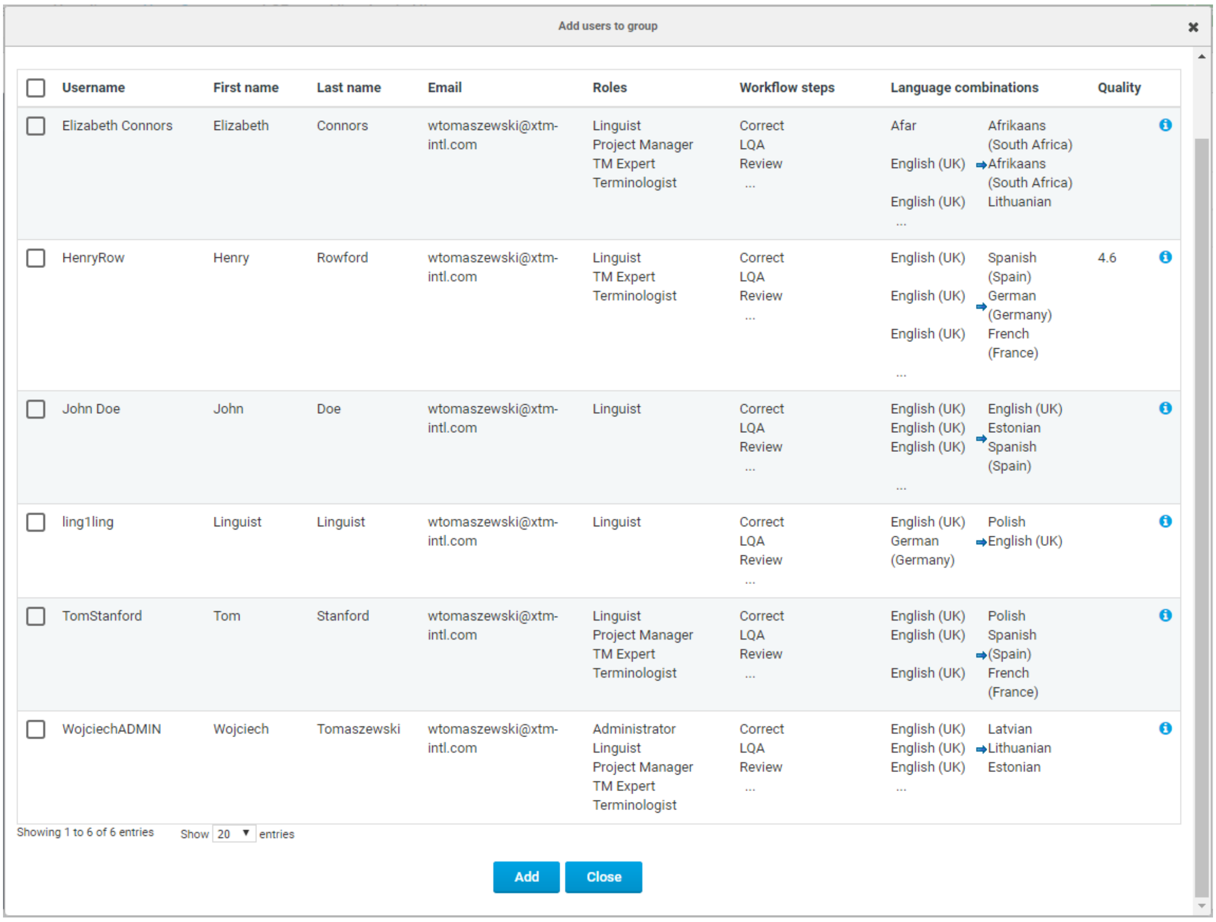
Adding a new user groups

When you have selected the Allocation order user group type. You can select the order in which users of this group are automatically assigned to tasks in the workflow. To change the allocation order, drag and drop a user into the correct position in the order.



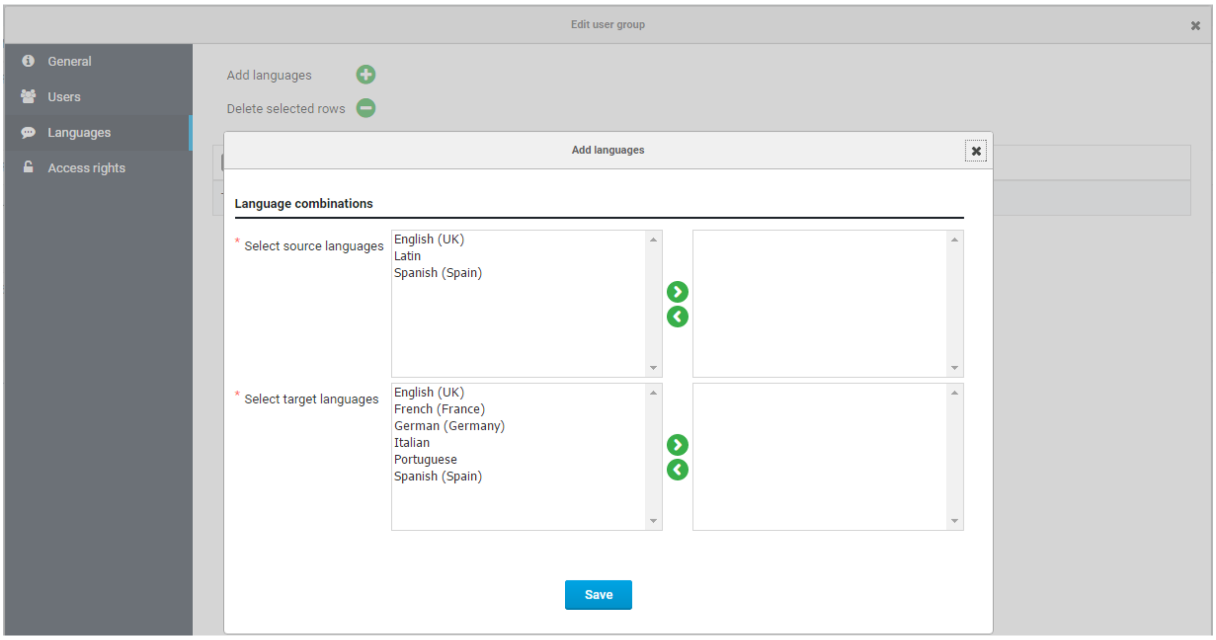
Changing users' allocation order in an allocation order user group

Click on the Users tab at the side to view the users who are a group. Additional users can be added to a group either from within the user record or by clicking on the Add users button. Select the desired users by checking the box in the left hand column and then click the Add button.



Adding users to a user group

Lastly define the language combinations for the user group. It will then be possible to assign the user group to tasks in the workflow on the workflow tab of the project editor for projects with this language combination.



Specifying the user group language combination

Projects

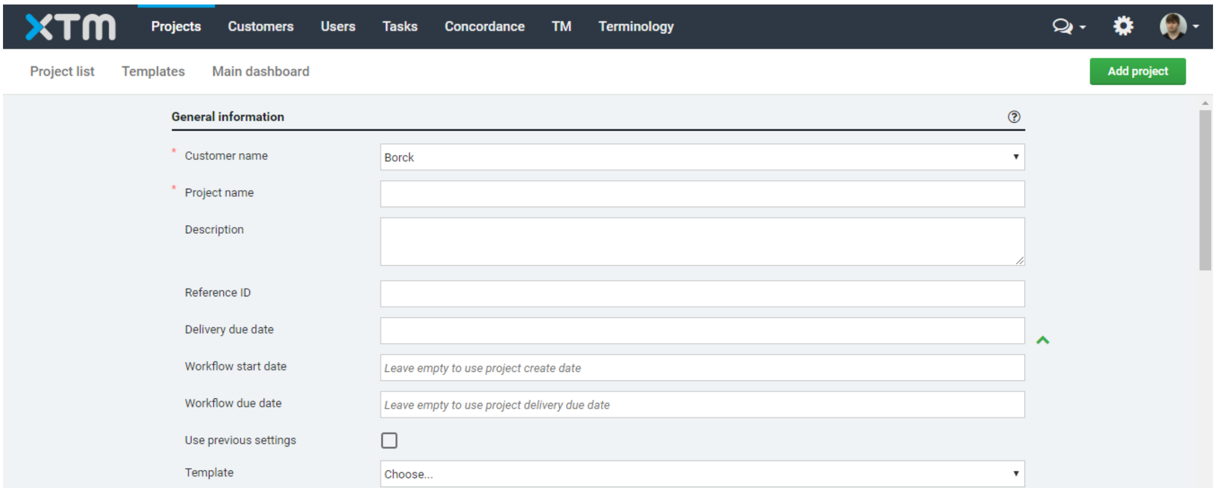
Creating Projects

When you receive a translation request you should create a new project, upload the files, define the workflow and assign a translation team to the project. XTM Engine automatically analyses the documents, extracts the text and applies the TM. You then assign the linguists to the tasks in the workflow. They in turn will receive an email to advise them they have a pending job. They can click on the link in the email, log on and undertake the task of translation or reviewing. The final step of this workflow is when you are advised that the translation and review is complete. XTM automatically creates the target file making it available for you to download.

Click on the Projects tab and then the Add project button to start the process. The options available during project creation depend on the configuration and permissions set by the XTM administrator. You will only see the settings enabled for you, thus the screen you see may be different from presented on the screenshots.

General information

Firstly select the customer name from the drop down list.



Creating a new project

After entering the customer name the other sections of the project creation screen will appear. The available language combinations will reflect any customisation made for the system or for the customer.

Enter general information about the project- its name, description, reference ID, subject matter and due date. If you have the Auto-calculate due dates for workflow steps enabled on the Configuration > Settings > Projects tab, you will see two optional due date fields: Workflow start date and Workflow due date. You can fill them in to increase the accuracy of automatically calculated due dates or leave empty to use the project creation and delivery due dates instead.

If you select the “Use previous settings” option then XTM will automatically enter all the settings from the last project for this customer.

If you have any global templates or customer specific templates for this customer then you can select one of them from the pull down list and all the settings for that template will be automatically entered.

Translation

In the translation section enter the source language of the document and select one or more target languages from the lists. Upload the files for translation by clicking on the browse button alongside the field “For translation”. Locate the file, click open and the path to the document will appear in the field. You may upload a .zip file that contains multiple files for translation. XTM limits the file size that you can upload at one time to less than 150Mb. If you have files that are more than 150Mb compressing them into a zip file may reduce their size below 150Mb.

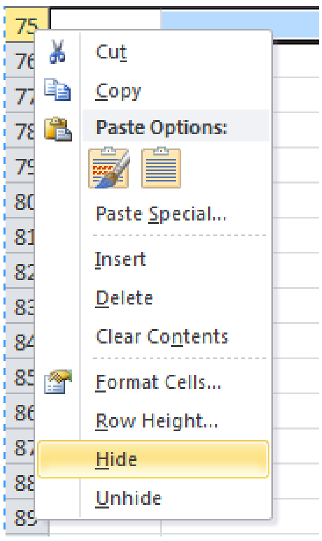
XTM supports the following file formats for translation:

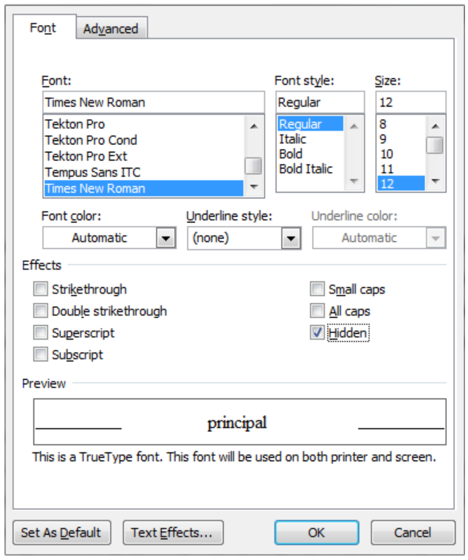
• Microsoft Office (doc, docx, xls, xlsx, ppt, pptx, xlsm)	• Microsoft Visio (vdx)
• Open Office (sxw, odt, ods, odp)	• Java property files
• Adobe FrameMaker (mif)	• JSON
• Adobe InDesign (idml, indd, indb)	• DITA
• Adobe Photoshop (psd)	• po, pot
• Adobe Illustrator (fxg, svg)	• yml, yaml
• PDF (converts file to Word)	• asp, aspx, ascx
• txt	• resx, resw
• rtf	• rc
• ini	• iOS apps (strings)
• xlf, xliff	• Android apps (xml)
• MemoQ (mqxliff)	• sdf
• Trados Studio (sdlxliff)	• Document template (tpl)
• Trados (ttx)	• svg
• Wordfast (txml)	• SubRip text (srt)
• xml	• SalesForce (stf)
• php	• Digia QT (ts)
• html, htm xhtml, xht shtml, shtm	• Markdown (md)

Processing MS Office Files

If you are translating Microsoft Word or Excel documents it is possible to exclude certain text by creating and setting the text to one of the following styles: Donottranslate, donottranslate, DoNotTranslate or tw4winExternal.

An alternative method is to hide the text in Microsoft Word or hide the row/column in Microsoft Excel so that XTM will not take the text for translation.





Hiding a row in Microsoft Excel *Hiding text in Microsoft Word*

If an MS Word document contains an embedded Excel file then XTM will include the Excel text for translation. However what is taken for translation depends on the Excel file that was used. If it was *.xls all sheets are taken to translation. If the file embedded in Word was *.xlsx only the active sheet is taken for translation.

If a Microsoft Word file contains a table of contents (TOC) then XTM will exclude this text from translation. It is possible then to recreate the TOC automatically after translation in MS Word. To do this open the document in MS Word, right click on the TOC and select “update field” from the pop up menu.

Processing XLIFF files

In addition to processing standard XLIFF files, XTM can process the following specific bilingual XLIFF files:

- Easyling
- Ixiasoft
- SDLXLIFF

For Easyling and Ixiasoft if the trans-unit contains more than one sentence, then XTM will not segment the text further and will display all the text from the trans-unit in one cell.

SDLXLIFF has two options:

1) segmented source
2) un-segmented source

For option 1) XTM keeps the segmentation and does not segment the text further and for option 2) XTM segments the source. To maintain the SDL segmentation and ensure that the TM is consistent between the two tools, we recommend using option 1.

Processing HTML Files in XTM Visual Editor

To process HTML files in the Visual Editor you must take care that the images are handled correctly, to ensure they are displayed in the WYSWIG view. The example below is a simple HTML file with a relative path to the image. If you process this in XTM you will find the images do not display in the Visual Editor.

```
<html>
<head>
</head>
<body>
```

<img src="stickman.gif" width="24" height="39" alt="Stickman">
</body>
</html>

There are two ways in which the images can be made to appear:

1) The HTML should include a full URL pointing to the image.
For example <img src=http://xtm-intl.com/stickman.gif>

2) The head element of the HTML file should contain a base tag.
For Example
<head>
<base href="http://xtm-intl.com/" target="_blank">
</head>

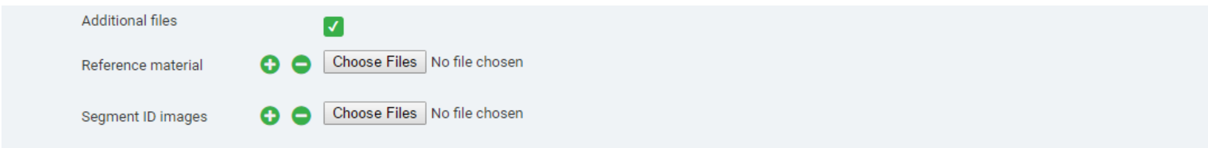
XTM Connect for Adobe InDesign

If you have purchased the optional connector for XTM to Adobe InDesign Server there is additional preview functionality. The InDesign Server can be either licenced by the customer or we can provide access to the XTM International instance.

This connector provides the ability to:

1) Upload and analyse .indd files
2) Make use of the XTM Visual Editor to review the translation in context and update the target in real time. This also includes the option to jump to a specific page in the document.
3) Generate a WYSIWYG pdf of the target file
4) Quickly and easily edit the translation. The preview pdf contains Live-Links from the text in the preview to the relevant segment in XTM Editor.

Images in .INDD or .IDML files can be embedded or linked. When InDesign is configured for your XTM account you have a section in project creation, under additional files called Preview files. This section allows you to upload linked images and the fonts used in the document.



Creating a project – uploading preview files

It is possible to upload a zip file with a directory structure of images for each target language. The images can be updated at any time during the life of the project, as they become available by opening the General info tab of the Project Editor and going to the Preview files section.

An example of the zip directory structure of preview files would be:

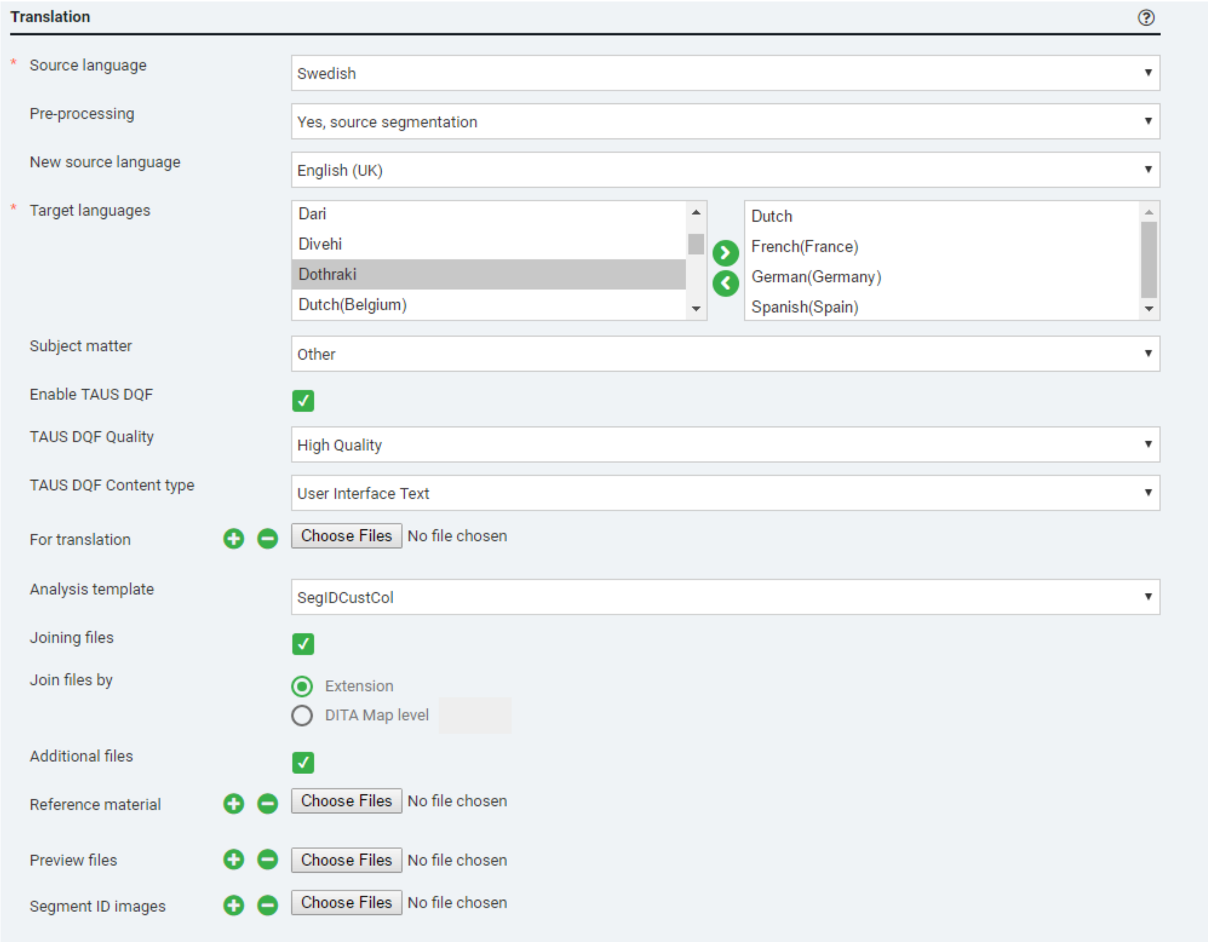
- path_to_image/graphic1.png
- path_to_image/graphic2.png
- pl-PL/path_to_image/graphic1.png
- fr-FR/path_to_image/graphic1.png

The InDesign preview method takes graphics from the localised directory level first. If a localised version of the graphic is not present, then it will use the source version. This means that graphics that do not need to be localised, do not need to be placed in the localised folders

The updating of the preview files has to be done by the principal project manager and is not available to subcontractors.

Other fields

If you attempt to upload a file type that is not supported, XTM will display a warning message and a project will not be created.



Creating a project – Translation section

Pre-processing is available during project if it has been activated in the Configuration tab. Pre-processing can be used to

- lock segments so that they are not taken for translation,
- edit the source text prior to the translation when the new source language is the same as the original source language and
- make use of a pivot language in the translation process. In case of the pivot language, source language is firstly translated into one language and then that target language becomes the new source for the translation into other target languages.

Subject matter this defines the field of knowledge necessary to provide a meaningful and accurate translation for a project. It is best to select linguists whose subject matter, or specialization, matches the one of the project.

Enable TAUS DQF. When TAUS DQF is enabled on the system level, it is possible to track translation quality and productivity using the TAUS DQF service. TAUS projects have additional settings that include a choice of the expected translation quality level as either High Quality or Good Enough. Project data can be then categorized in TAUS using the TAUS DQF content type.

Analysis template this field become visible when an analysis template has been created for the account. Analysis templates can be used to achieve a number of different goals that include specific selection of source text for translation from source files, hiding code inside translatable segments or ensuring product names are not translated. XTM International staff can help you to configure an analysis template to use regular expressions as part of the file analysis process.

Regular expressions can be used to:

- Convert part of the source text into inline elements before translation and then restore the original text in the target file. This is especially useful for variables in text like %value% or $[value] and can be used to prevent accidental corruption of the variables by the translator. It also reduces the translatable word count. This processing can be set to work for all file types or as a part of a project specific analysis template.
- Convert specific text in the source document. For example all instances of one word can be automatically converted to another. The regular expression is only applied to the content that is taken for translation so hidden content remains unchanged. This option needs to be configured per file type, but can also be a part of an analysis template.
- Convert specific text in the source document to string metadata. For example all instances where text is used to describe a context or string location can be automatically converted into a column in the XTM Editor. There are no limits to the amount of metadata that can be displayed or the number of columns that can display it. The regular expression is only applied to the content that you have defined as metadata. This option needs to be configured per file type, but can also be a part of an analysis template.
- Convert specific text in the source document to string length restrictions. For example all instances where you have listed the string length can be automatically converted and used as the length restrictions in the XTM Editor. This means warnings can be applied where the text is too long. The regular expression is only applied to the content specified by the regular expression. This option needs to be configured per file type, but can also be a part of an analysis template.
- Convert comments added to source files into normal segment comments. This way additional context or string instruction can be carried over from source files.
- Detect language codes in source documents. When defined, XTM will automatically place the correct target language in the correct area. For example, where text is used in columns and target languages need to be populated in adjacent columns, this is now automated reducing the post processing work for multilingual files. In order to use analysis templates like this you have to use XTM language codes and it needs to be configured per file type, but can also be a part of an analysis template.
- Detect String ID in the source document. When defined, XTM will automatically place the correct String ID under the segment. This enables you to use ID based matching for Excel files. For example. when string ID based matching is used in XTM it enables the user to use features such as linking images to segments or using the segment filter based on IDs in the XTM Editor. It is very useful for software localization and dramatically improves translation memory matching. This needs to be configured per file type, but can also be a part of an analysis template.

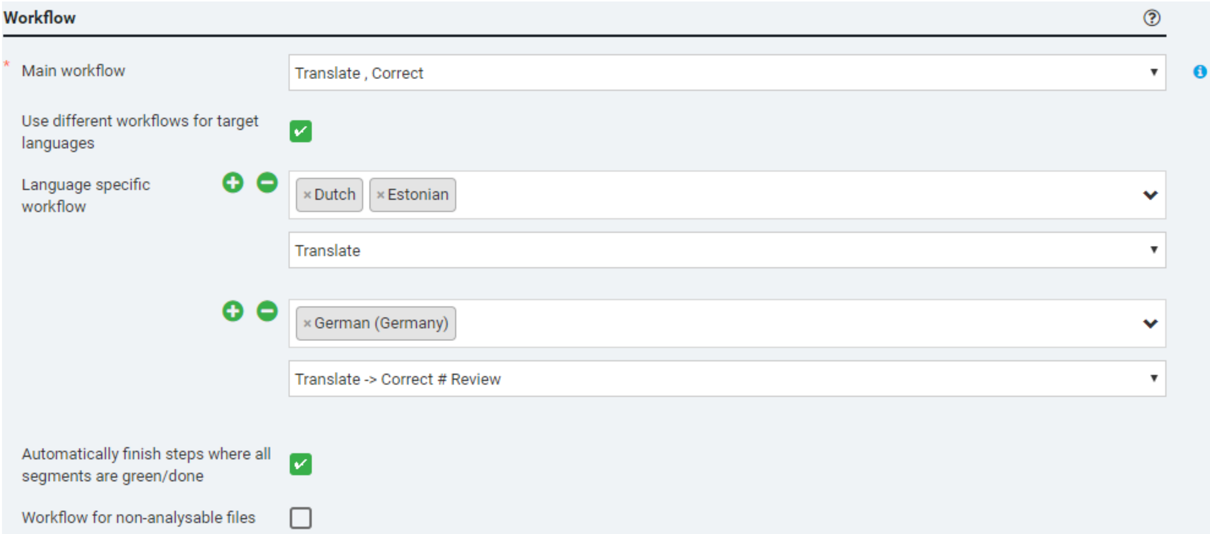
Joining files. The join files check box allows you to merge files with the same file format. When the project is created, the joined files will be displayed as one file for each file format. More joining file option, such as Join files by, can be configured on the Configuration tab > Settings > Projects > Joining files in sets.

This will simplify managing the translation workflow enormously. To use this feature all the files that are to be joined should be uploaded in a single Zip file.

Additional files. The field “Reference material” is to allow you to upload additional information that may assist in the translation process, for example a style guide, .pdf of the document or a glossary. It can be used as well to upload preview and segment ID images files.

Workflow

In the Workflow section you can select one of the predefined workflow templates for the entire project or different workflows for target languages. The section also includes other workflow settings.



Creating a project – Workflow section

Automatically finish steps where all segment are green/done. You can use this option to automatically push fully matched files to another step in the workflow.

Workflow for non-analysable files. By default, non-analysable files such as images, corrupted files, empty files or files in unsupported file formats are not included the workflow. In order to add these files to the workflow, you have to enable this option and select the same or different workflow for them.

Work flow definitions

Project	Processing one or more files from one source language to one or more target languages.
Job	Processing of one file from the source language to one target language.
Step	The default workflows in XTM are composed of steps; the steps that are available by default are: translate, correct, review, approve TM and LQA and with the following functionality.

Step name	User functionality
Translate	Edit target text Manually add comments
Correct	Edit target text Manually add comments. If the target text is changed a new comment is automatically created to record the change made
Review	Manually add comments

Approve TM	Automatically approve the TM of changed segments, segments set to done or ICE and leveraged matched segments.
LQA	Users can check translation errors.

The system administrator can also create custom steps.

Bundle	The project manager may divide the text segments into sections which are called bundles. Bundles can be allocated to different linguists.
Task	Processing a bundle in one step is a task.

When creating a new project by default each job contains all the segments from the file (e.g. if a document has 150 segments XTM creates the tasks for segments 1-150). The project manager can then split the default tasks into smaller parts. Each bundle in the project follows the same steps in the workflow.

XTM contains a number of default workflows which are:
- translate
- translate # review
- translate # review # review
- translate -> correct
- translate -> correct -> correct
- translate , correct
- translate , correct -> review
- translate , review
- translate , review -> review
- translate # correct
- translate -> correct # review

Between the steps there can either be a "," a "->" or a "#".
The "," means that steps can be processed simultaneously.
The "->" means that the next step cannot be started until the previous step for that bundle is finished.
The "#" means that the next step cannot be started until the previous step for all the bundles have been completed.

For each task a linguist can do three things:
- finish the task
- reject the task
- decline the task – if the linguist declines the task the PM will have to assign it to another person

Using the workflow example 1 above:

Example 1

	Translate 1	**,**	**Review 1**	**->**	**Review 2**
Bundle 1	Task (translate1,bundle1)	,	Task (review1,bundle1)	->	Task (review2,bundle1)
Bundle 2	Task (translate1,bundle2)	,	Task (review1,bundle2)	->	Task (review2,bundle2)

In this workflow example:
- Once the workflow has been started, Translator 1 and Reviewer 1 can work simultaneously.
- The tasks in Review2 are initially not active.

- When Reviewer1 has finished reviewing bundle1, the task Review2 for bundle 1 becomes active and Reviewer2 can start work, irrespective of the status of bundle 2.

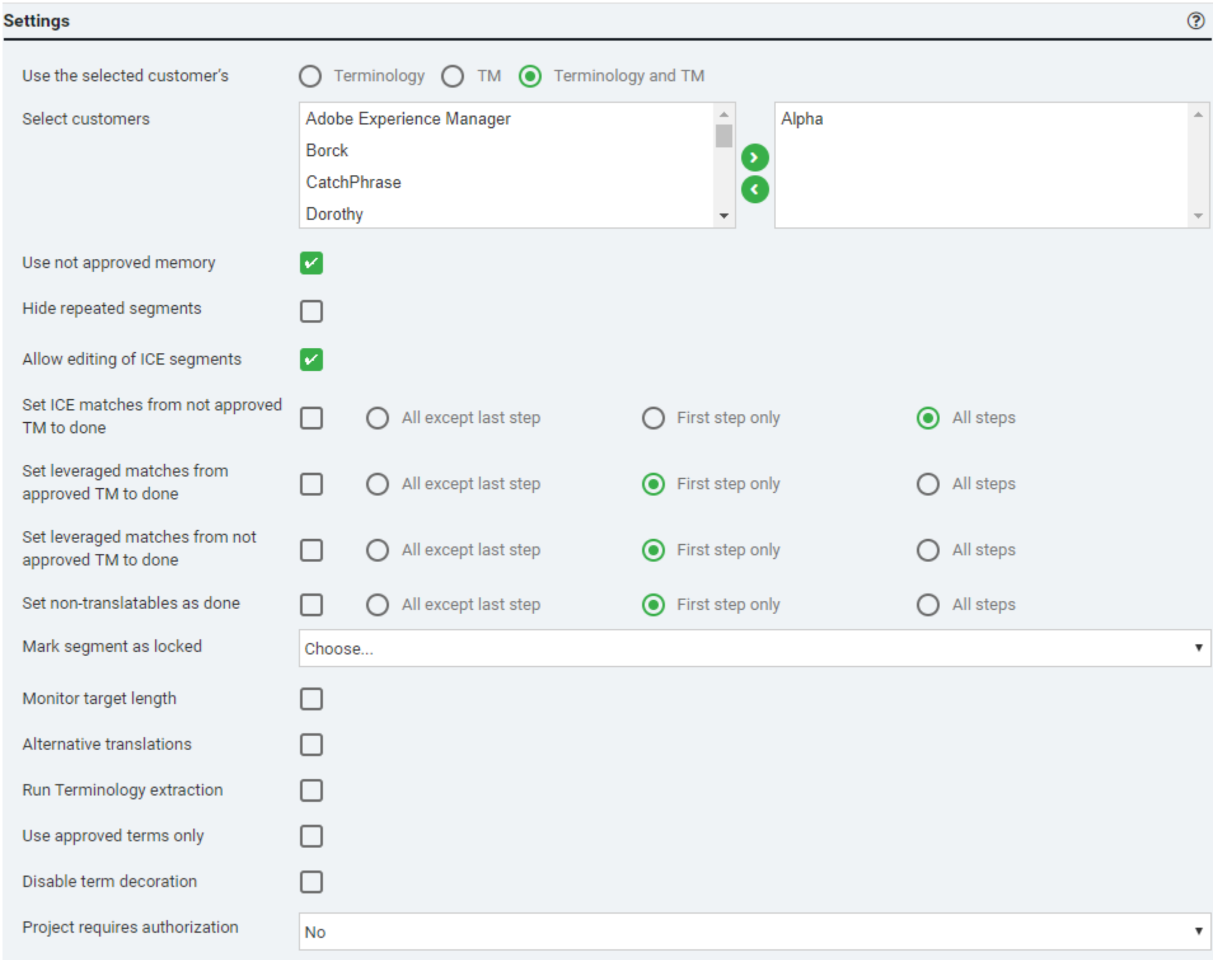
Example 2

	Translate 1	#	Correct 1
Bundle 1	Task (translate1,bundle1)	#	Task (review1,bundle1)
Bundle 2	Task (translate1,bundle2)	#	Task (review1,bundle2)

In this workflow example:

- Once the workflow has been started, only Translator 1 can start work.
- The tasks in Correct1 are initially not active.
- The tasks in Correct1 only become active when both bundles 1 & 2 have been finished in Translate1.

Settings



Project creation – Settings sections

Selecting translation memory and terminology XTM automatically tags TMs and terminology with the customer name. When you create a project XTM automatically uses the customer's TM and terminology for the matching. However, you can also use other TMs and terms for this project by choosing customers from the box entitled "Select customers".

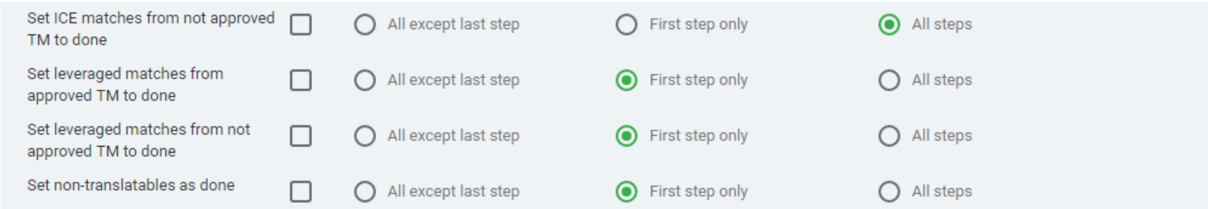
Use not approved memory. By default, XTM only uses approved TMs for matching. However, you can use non-approved TM by checking the box "Use not approved memory". It is important to note that XTM automatically approves TM when a project has been completed, so by selecting this option you may be using TM that has not been through a correct or review process yet.

Hide repeated segments. The option allows you to hide repeated segments when repeats exceed a specified percentage part of a file. When the specified threshold condition is met and the project is being opened in the XTM Editor a filter called "All segments except repeats" is triggered automatically. The filter hides repeated segments but displays all other segment types including the source of repeats.

The filter can be deactivated in XTM Editor and activated again but it is not available for projects where the hide repeated segments option was not activated.

Allow editing of ICE segments. Select this option to unlock In-Context Exact matches for editing.

Setting matches to done. There is a number of options that can immediately set specific types of matches or non-translatables to done without the need to confirm them in the XTM Editor. These segments can be set to done in the first workflow step, in all workflow steps or in all workflow steps except the last one.



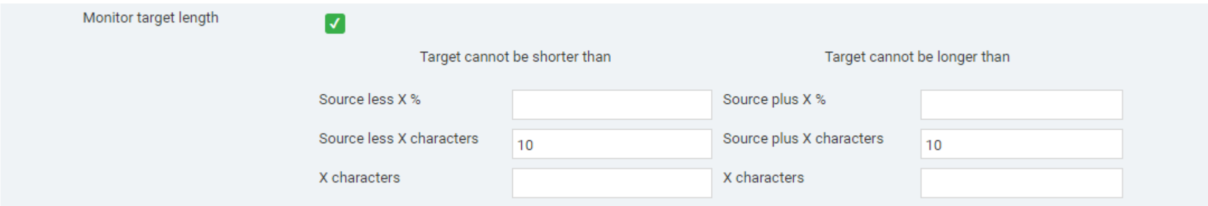
Project creation – Settings – Setting matches to done

Mark segment as locked. You can the segments to lock from:

- Match type is approved or not approved ICE and Leveraged
- Match type is approved ICE and Leveraged

Monitoring target length Checking this box allows the linguists to monitor the number of characters in the target segment. There are three options that appear which enable you to set the character limits of the target segment.

1) XTM will calculate the upper and lower character limits based on the number of characters in the source text plus or minus a specified percentage.
2) XTM will calculate the upper and lower character limits based on the number of characters in the source text plus or minus a specified number of characters.
3) An exact number of characters for the upper and lower limit.



Defining the upper and lower limits of the target text

XTM controls the target length of a paragraph and not a sentence. These segments are separated by a dotted line in XTM editor. Thus for example when translating an Excel file, XTM controls the length of all the text in a cell or in an XML file all the text in an element.

Alternative translations. If set in Configuration and for the customer, the Alternative translation check box will be visible when creating a project – enter a check and the number of alternatives to activate the feature for the project.

When this option is active, XTM segments the source text by paragraphs and in XTM Editor displays each source segment multiple times. There is a recommended translation followed by the set number of alternative translations, all of which can be completed by the translator. Each alternative translation has a field to enter a back translation.

The comments section can be used as a place to enter the rationale for each translation. A reviewer may choose the desired alternative translation and copy it from the alternative to recommended translation. Only the recommended translation will be used to generate the target document.

Additionally, the Alternative translation report can be generated and downloaded from Project Editor, Files tab, Previews. This gives you an Excel file containing all the translations, back translations and comments on one sheet.

Run Terminology extraction. XTM will extract a list of candidate terms as an additional step in the file analysis. The candidate terms are produced as an Excel spreadsheet which can be downloaded from the Download option of the Context menu in the Project listing.

Use approved terms only. Check this option to use only terms with the Approved status.

Disable term decoration. Check this box to turn off highlighting of terms found in the source language of the XTM Editor. You can still select a word and use the context menu to add it quickly to the terminology.

Project requires authorization. Check this box to notify Customer Project Managers about newly created projects and request their confirmation to proceed with the translation. You have the option to require authorization for all projects created for the specific customer or only projects that exceed the word count specified.

Machine translation

XTM has been integrated with a wide selection of machine translation engines. The MT engines that are visible and available for selection during project creation depend on what has been set up by the system Administrator for the entire system or on a customer level. The MT engines are:

- Google Translate
- Omniscien Technologies
- Tauyou
- SmartMATE
- Microsoft Translator
- Safaba
- KantanMT
- CrossLang
- Amplexor
- Lingo24
- Oneliner
- Lionbridge GeoFluent
- SYSTRAN Pure Neural™

For Google, Tauyou, SmartMATE, MS Translator, XTM works by sending the source text segment by segment from within XTM Editor for matching. Which segments are sent for MT matching is determined by the settings entered on the Configuration tab > Settings > Translation > Machine translation. Segments that are not matched by the TM will be shown as MT matches in the project metrics. When an MT system is selected for use, the translator will have the option to view MT matches in XTM Editor.

Omniscien Technologies, Safaba, KantanMT, CrossLang, Lingo24, Oneliner, Lionbridge GeoFluent and SYSTRAN Pure Neural™ work by sending the entire XLIFF for matching and for this reason the project creation may take longer when this option is used.

With Amplexor and Microsfot Translator you can decide when segment are sent for machine translation: during project analysis or on a segment-by-segment basis in the XTM Editor.

It is important to consider data security when using MT matching as your data may leave the security of the XTM system during this process.

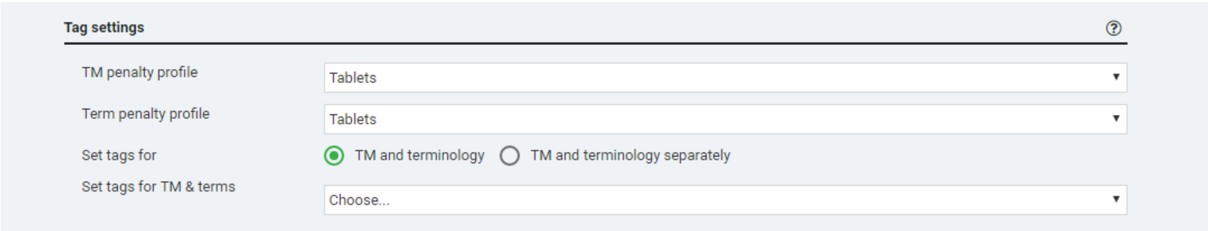
When you have filled in all the fields click the create button at the bottom of the page.

Tag settings

When you are creating a new project if you have set up tags and penalty profiles in Configuration -> Data, a tags section will appear at the bottom of the page – Section 5.

To apply either a TM or term penalty profile to the project select the profile from the pull-down list. Any TM or terms in the XTM database that match the criteria in the penalty profile will be penalized and the modified match will be shown in XTM Editor.

Then set the tag group and tags you wish to use for this project. Any TM or terms that are created during the project will be tagged accordingly.



The tag settings section that is visible when tags have been created in configuration

Word count usage

If you have an XTM Cloud Freelance or Small Group Account, there is a limit on the number of words that you can process through the system.

Each month your account will be automatically credited with the specified number of words and you can also buy additional words on-line as you require them. Then as you process jobs the words will be deducted from your running total.

The words in ICE matches and non-translatable segments are not counted or deducted from your word allowance.

The words are not deducted during project creation. This gives you the possibility to check metrics and open XTM Editor in read only mode to check segmentation. The project is activated and words subtracted from your allowance when one of the following happens:

- XTM Editor is opened with full read write access
- When you generate any of the files on the Files tab
- For a Group account if a workflow action is performed such as assigning a user to the workflow or starting the workflow

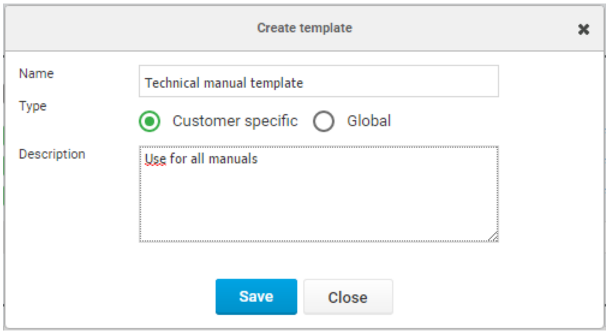
Once the project has been activated the words are subtracted and this cannot be undone.

At the end of the month any unused words on your account are carried forward to the next month. This only happens for one month after which the unused words are lost. XTM will always use the oldest words first.

Templates

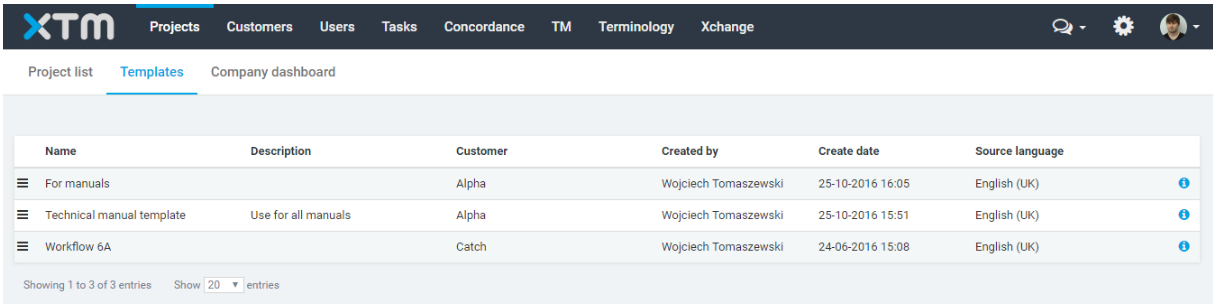
A template stores the settings for creating a project and allocating translators. It can be customer specific or global. Global templates are available for projects from all customers. By using a template to create a project you can reduce the time to create it, by entering virtually all the required information with just one click.

Templates can be created either when creating a new project and clicking on the “Save as template” button at the foot of the page or from the project listing menu. When you select either of the above the create window appears.



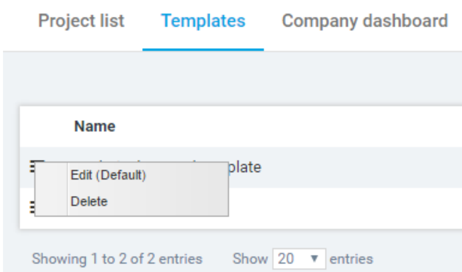
The Create Template Window

To view and edit templates click on the Templates tab at the top which displays a list of templates.



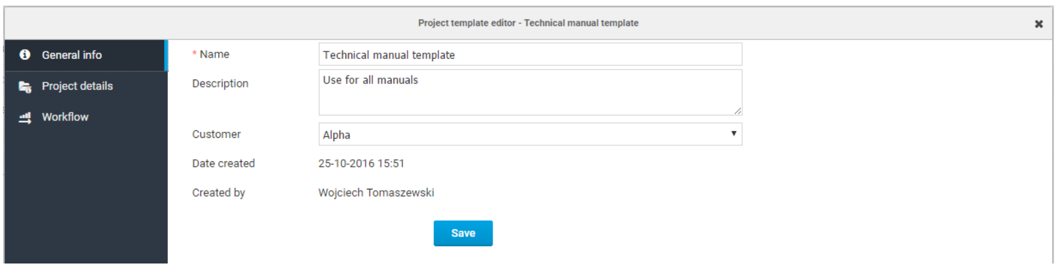
The Project Template line listing

To delete a template click on the menu icon in the left hand column and select delete.

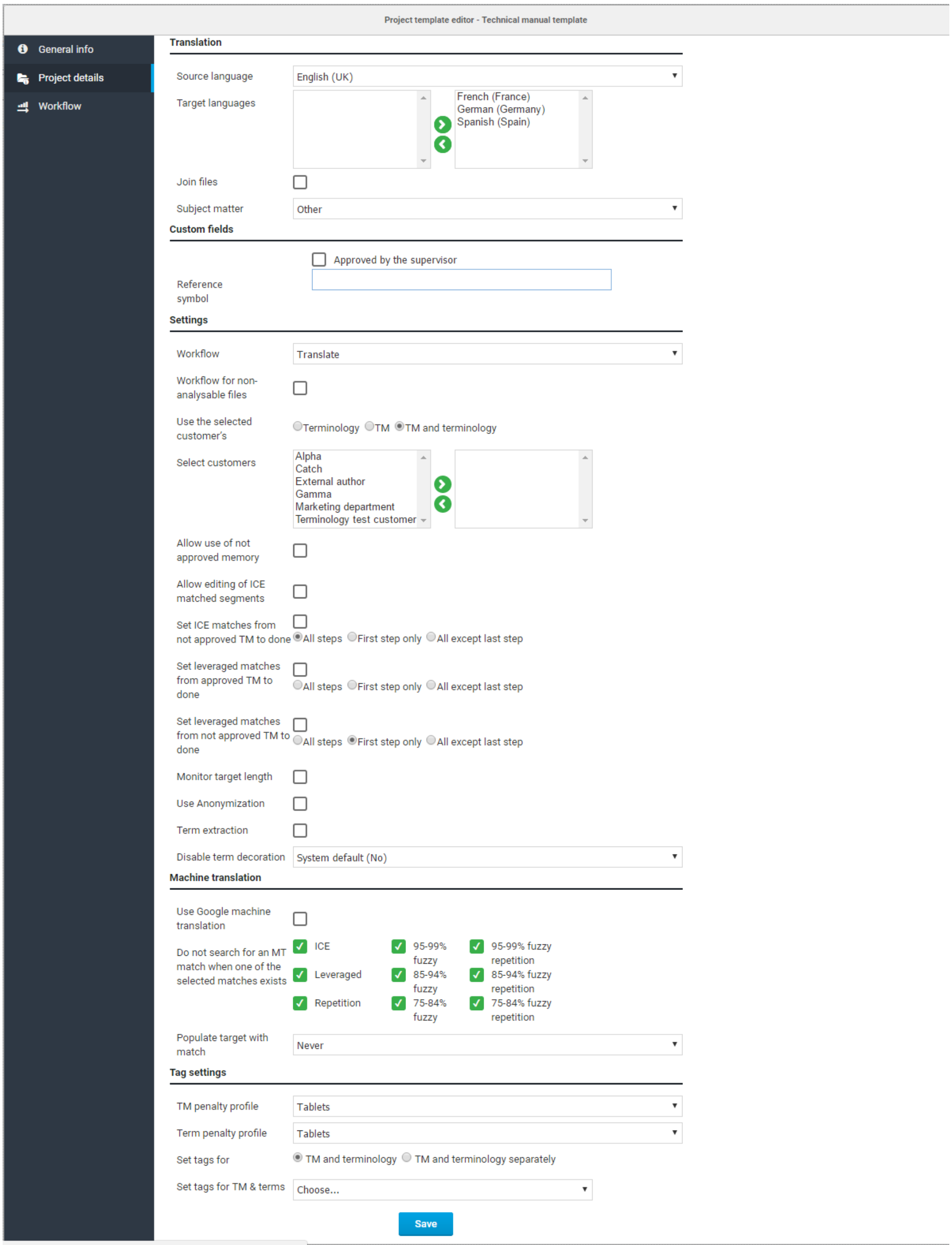


The Project Template line listing menu

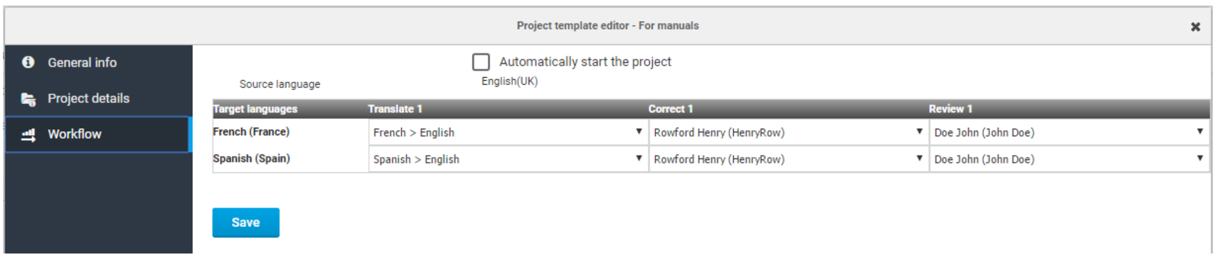
To edit a template either select edit for the line listing menu shown above, or click on the template. The Project template editor will open where you can alter any details.



The Project Template Editor - General info



The Project Template Editor – Project details

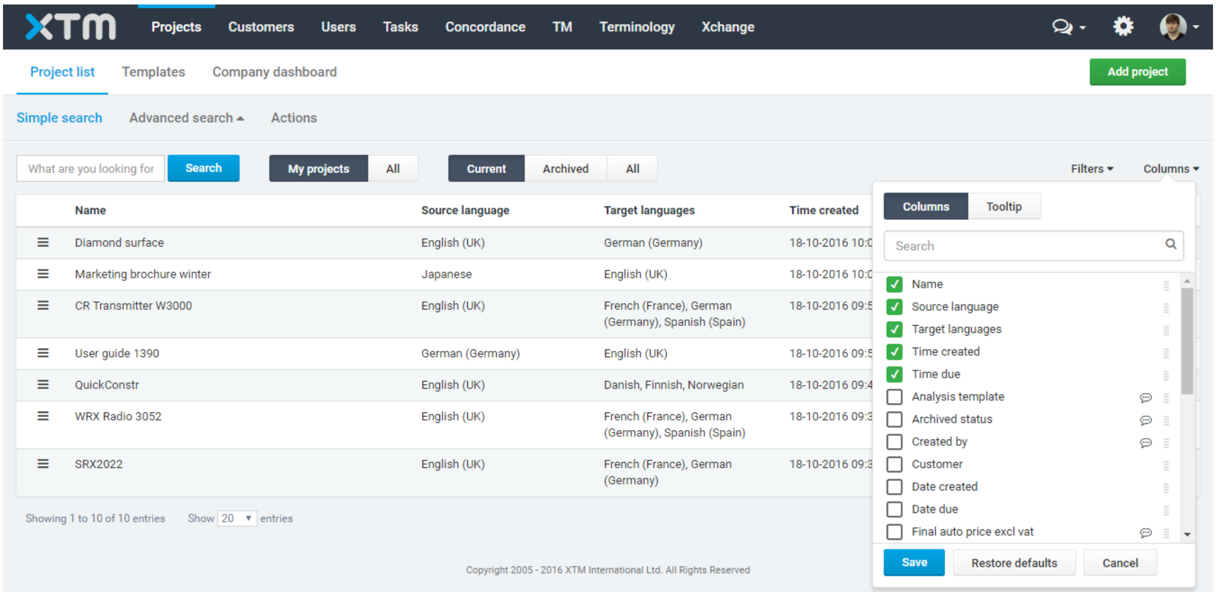


The Project Template Editor – Linguist assignment

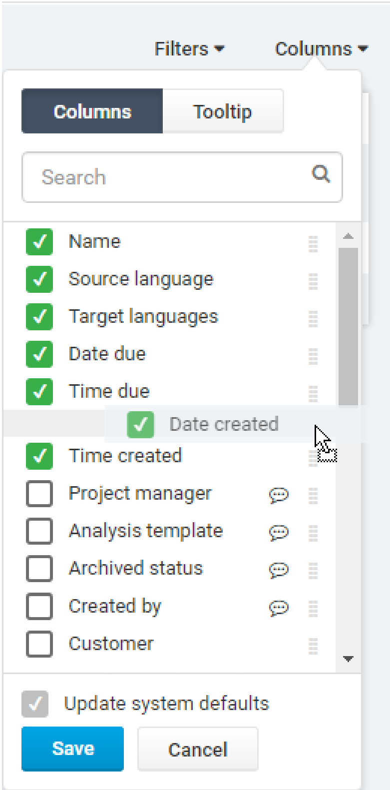
Customizable columns in the project listing

You can choose what data you want to display in the project listing and the order of the columns. This can include data from any Project Custom fields you have created. To do this click the Columns button to open a pop up window with all available columns. Check the ones you want to show. To change the order of columns, drag the name and drop it in the desired position.

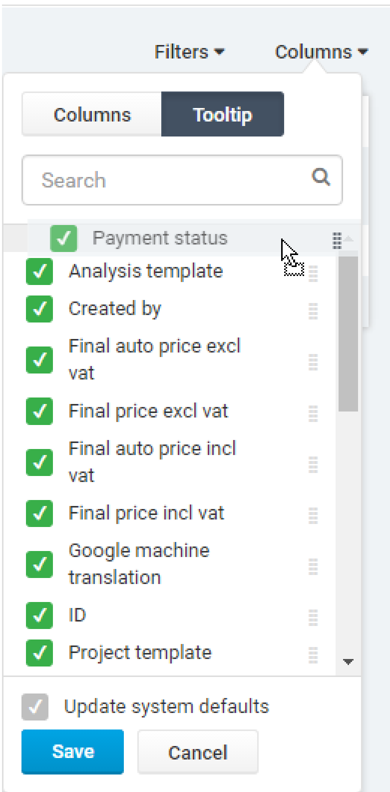
In the Tooltip section of the window, select the tooltips you want to display when you place the cursor on the icon of a project. If you are an administrator and want to select the default columns and tooltips for all users, check the box for Update system defaults before you click Save.



Project listing



Drag a column name to change its position on the project listing



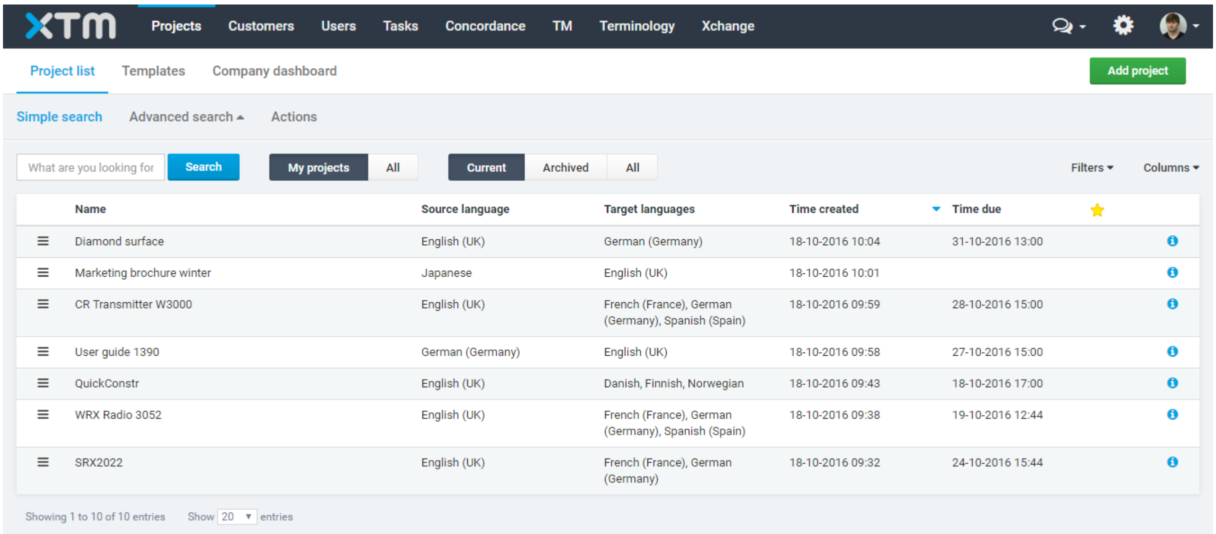
Drag the data name to change its position in the project tooltips

Searching for Projects

When displaying the list of projects firstly decide if you want to view just your projects or projects belonging to all project managers and click the relevant button in the search line. Then you have the option of viewing current projects, archived projects or all of them.

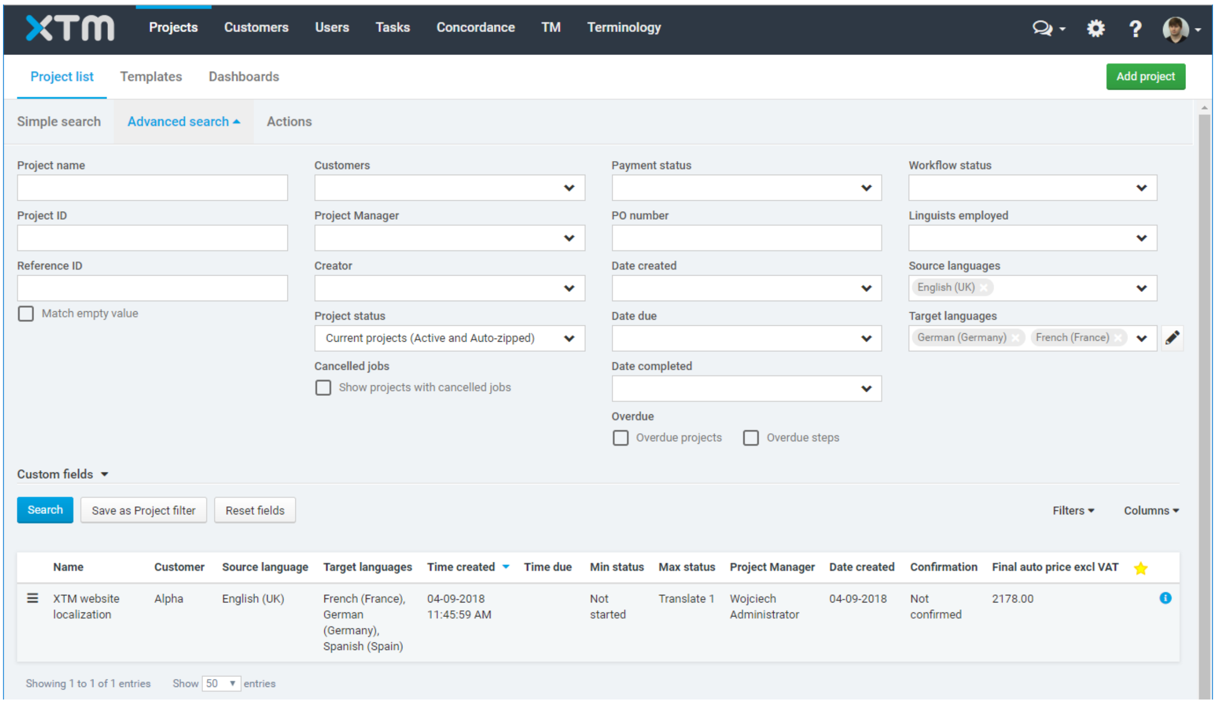
To refine your search there are two options for finding projects – the Simple or Advanced search.

1) The simple search. Click on simple search tab to make it active and then type in the search field. XTM will then search against the project name, ref. ID, customer name, source language, date created, due date, minimum status or maximum status.



Project simple search

2) The advanced search. Click on advanced search tab to make it active.



Project advanced search

You may search by:
- Project name
- Project ID
- Reference ID
- Customers
- Project Manager
- Creator
- Project status
- Payment status
- PO number
- Date created
- Date due
- Date completed
- Workflow status
- Linguists employed
- Source language
- Target languages

For the target language field you have the option to find projects containing:
- any of the selected target languages
- all the selected target languages
- only the selected target languages

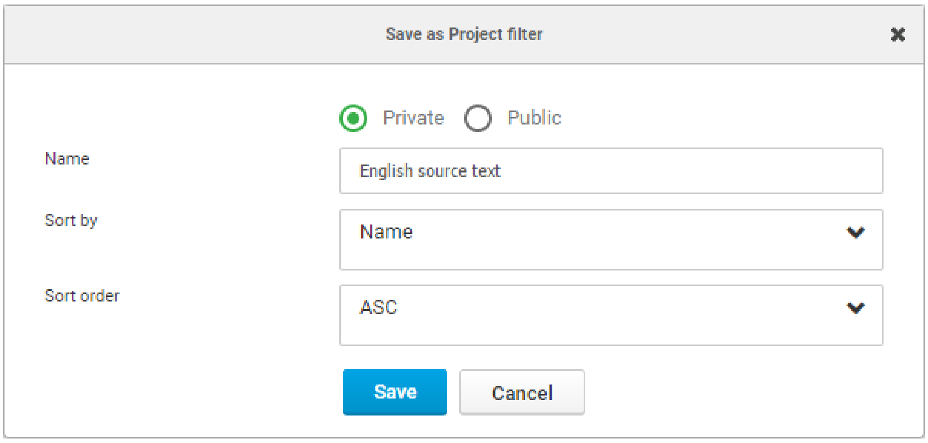
Additionally, you can filter by the target language workflow status:
- Started
- Not started
- Finished
- Not finished

For the two date fields there is a drop down list of date ranges, however you can also enter a custom date range. When you choose "Custom range" from the pull down list a new field appears below where you can enter the required dates.

Smart filters

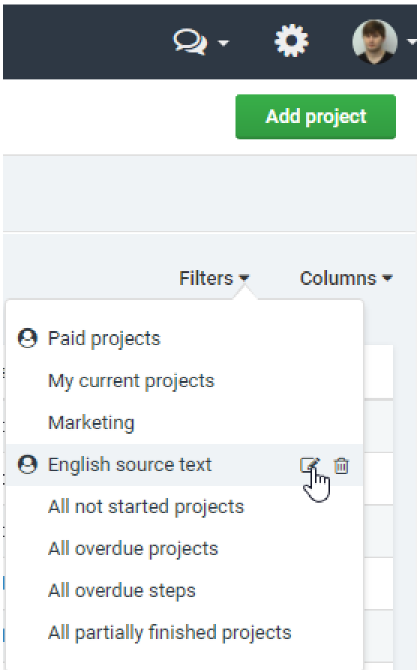
Smart filters are advanced search settings saved for later use. You can apply smart filters to the project listing to quickly find the relevant projects.

You can create smart filters on the Advanced search tab. Choose the search criteria, and click Save as Project filter. Decide if the filter should be available only to you or to all project managers, enter a name for the filter and select the sorting method, then click Save.



The Save as Project filter dialog

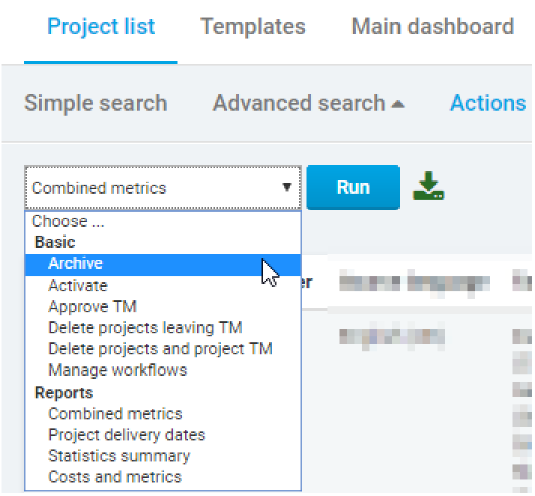
Smart filters are available for use on the project listing. Selecting a filter will perform the configured advanced search and will efficiently return the matching results. Private filters are distinguishable by the icon. To change a filter name or delete it click the icon by the name of the filter.



Smart filters

Actions for Projects

On the Actions tab you are able to carry out a number of actions on multiple projects simultaneously. Select the desired projects by clicking in the box in the left hand column. Then select the action from the pull down list and click Run. The available actions are



The available project actions

Archiving and activating projects

Zipping or archiving finished projects is an important house-keeping task that ensures good backup speed, disk access speed, browser speed, database speed and server maintenance.

Zipping is an automatic process that XTM performs on a daily basis. It zips all the files in certain projects, but does not mark them as archived. Archiving on the other hand is a manual process that zips all the files involved in a project and marks the project as archived.

XTM will automatically zip all projects that fit into these categories:

1. Finished projects that have not been used for 5 days
2. Unfinished projects that have not been used for 15 days.

The definition of “used” is the project has not been opened in XTM Editor or Project Editor or no “action” on the Action tab has been taken on the project.

When a current project has been zipped it will remain on the current project listing, but will be italicised and the project menu icon will be grey.

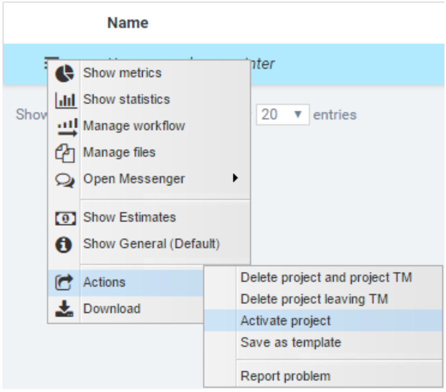
Projects can be manually archived from two locations.

1. The simple search tab list of projects: individual projects can be archived by clicking on the context menu icon in the left hand column and selecting “Archive project”.
2. The Actions tab list of projects: Select the projects by clicking in the check box in the left hand column, select Archive project from the pull down menu and click the “Execute” button. This option is useful if you have many projects to archive.

If you have many projects to archive we do not recommend archiving them one after another from tooltip menu as this can create a high load on the XTM system. However, if you select all the projects on the 'Actions' tab and archive them all at once, this operation will be executed in batch mode, so the work load will be queued.

An archived project will not appear under the current list of projects, the menu icon is grey and the line test italicised.

Archived or zipped projects can be easily reactivated should you wish to access the files again by selecting the item from the project menu.



Activating a zipped or archived project

Approve TM

By default, XTM sets the TM generated in a project as approved on the last step in the workflow. This default setting can be changed in the workflow editor. In addition, the TM for selected projects can be set to “approved” manually from the actions tab.

Delete Project with or without TM

These options allow you to delete the selected projects while deciding if you want to keep the TM generated in the project or not.

Manage Workflow

In order to enter the Manage workflow window perform the following steps:

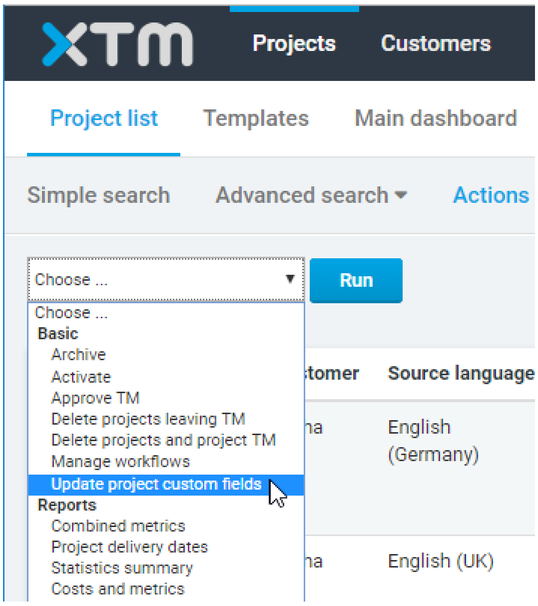
- On the project listing go to the Actions tab.
- Select one or more projects by clicking on checkbox in the left hand column.
- Select Manage workflow from the dropdown list titled “Actions for selected projects" and click the Execute button.

The Manage workflow window will open where your will find two tabs:

- Manage workflow – to manage workflows of one or more projects.
- Assign linguist – to manage linguist assignment for specified steps for one or more projects at once, and start and finish the workflows.

Update project custom fields

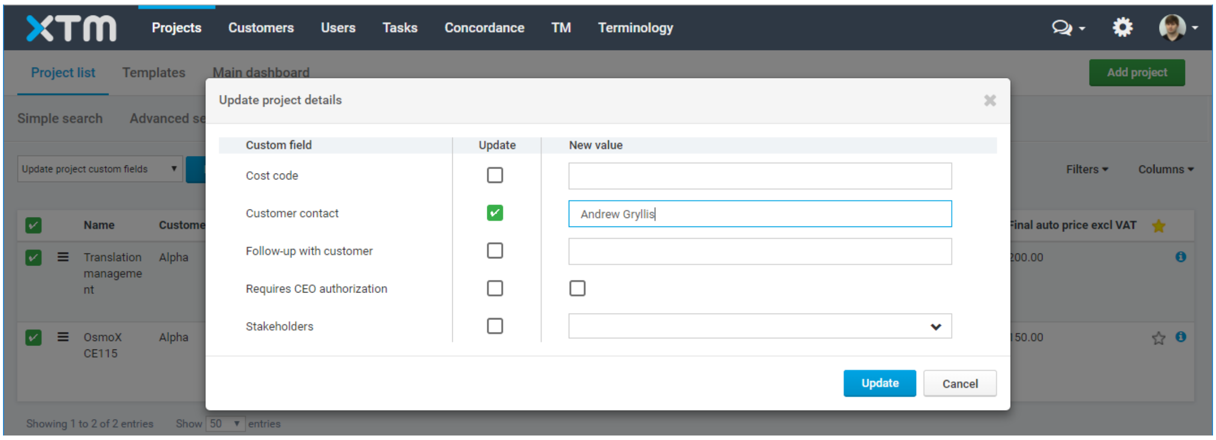
Custom fields can be updated for multiple projects in one go. Running the Update project custom fields command on the Actions tab opens the Update project details window.



Projects > Project list > Actions > Update project custom fields

In the pop-up, you can tick custom fields for modification and enter or select new values. Only fields with the green tick are updated. Leaving the New value field empty does not erase the former value of the custom field as long as the Update checkbox next to it is not ticked.

When custom fields are dates, they are automatically converted to users' preferred time zones.



Projects > Project list > Update project details

Visibility of updated project custom fields to LSPs

By default, custom fields can be updated for all users of a single XTM account. If you want subcontractors involved in the project to see the values of custom fields updated from the Actions tab, contact XTM Support. When sending a request to XTM Support to enable visibility of updated project custom fields, please indicate whether this should apply to all LSPs or just individual ones.

Subcontractors will only see values of the custom fields that were updated, provided that both the custom field names, type and selection options exactly match those of the contractor that requested the changes. Other custom fields will look blank to subcontractors.

When a custom field is updated by a contractor but it does not exist in the subcontractor's XTM account, it will not be changed.

Subcontractors can modify values of updated custom fields. When it happens, the new values are changed only on the subcontractors side. If the contractor updates custom fields again, the custom fields modified by the subcontractor will be overwritten and updated again.

If you do not want subcontractors to see the updated values of the custom fields, you can update custom fields for each project individually using the Project Editor.

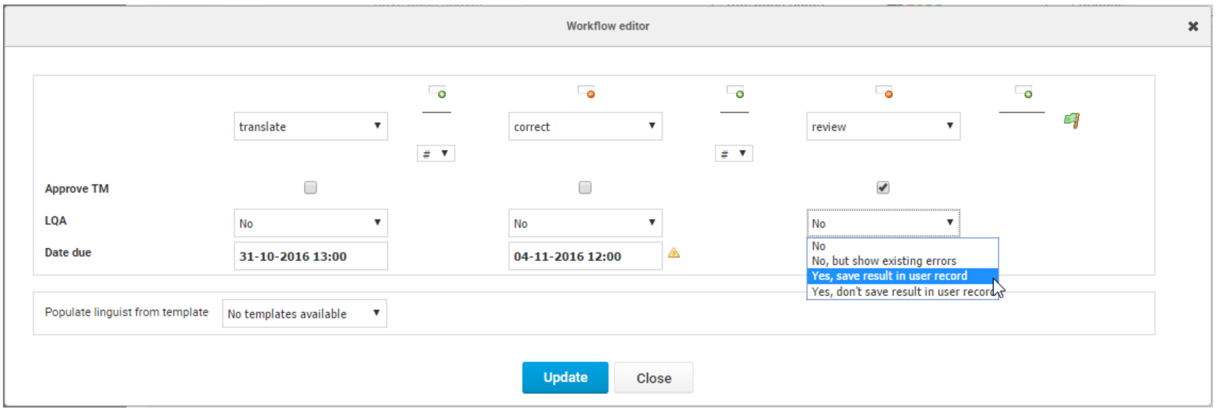
Multi-level LSP language delivery chain

When the language service delivery chain consists of multiple LSPs in a contractor-subcontractor relationship, visibility of updated custom fields has to be enabled individually for each of the LSPs that uses other LSPs as subcontractors.

Changing the workflow

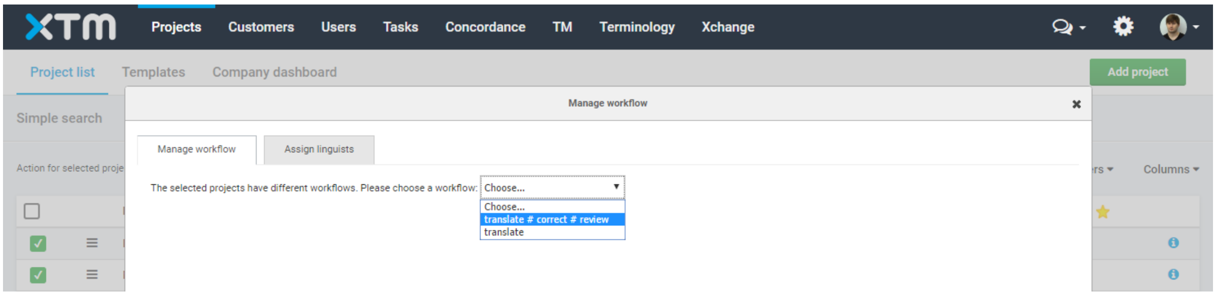
The Manage workflow tab allows you to edit the workflow for all selected projects at once. This provides similar functionality to the Project Editor->Workflow->Change workflow tab.

Change the workflow as required and click the Update button.



The manage workflow window

If the selected projects have different current workflows a dropdown list will appear where you can select which workflow to edit.

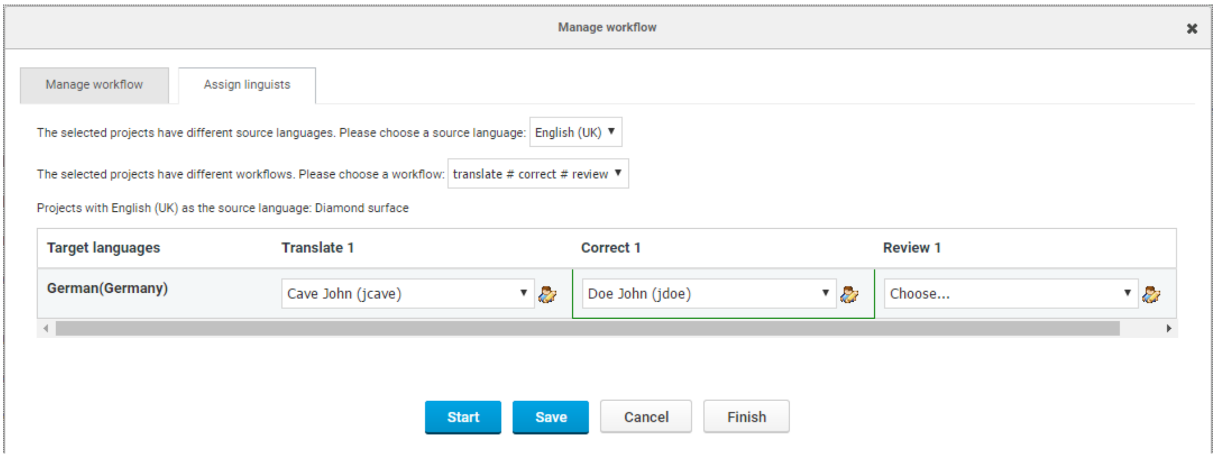


Selecting the workflow to change

Once you have selected the workflow you will be informed which projects, use this workflow and that only files which are using this workflow will be updated. The selected workflow will appear and you can edit it in the normal way. By clicking on the "Update" button the changes will be saved.

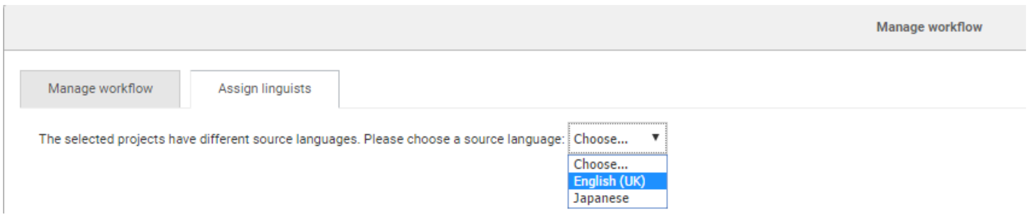
Assign linguists to projects

To assign linguists to the selected projects click on the "Assign linguist" tab. Assign linguists or LSPs to each step using the dropdown list or from the linguist table by clicking on "Linguist details" icon. You can also start, save or finish workflows. You will be informed which projects will be changed.



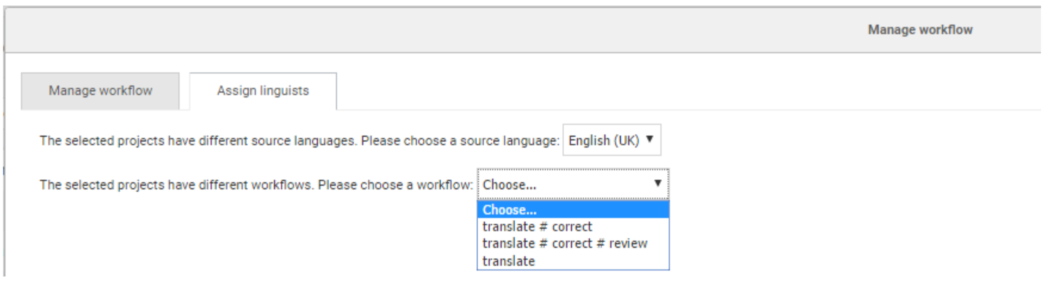
Assigning linguists to the workflow

Assign linguists for projects with different source languages and/or different workflow:
On "Assign linguist" tab select the source language form the dropdown list:



Assigning linguists to the workflow – Selecting the source language

Then select the workflow for the specified source language if the settings are different:



Assigning linguists to the workflow – Selecting the workflow

You can assign linguists or LSPs to each step using the dropdown list or from the linguist table by clicking on the Linguist details icon. You can also start, save or finish workflows. You will be informed which projects will be changed. When the selected projects have more than one target language they will appear in separate lines.

Starting workflows:
On the Assign linguist tab make any changes you require, then click the "Start" button. Note that all workflows from the list will be started, even projects that have more than one target language.

Closing workflows:
On the Assign linguist tab click the Finish button. Note that all workflows from the list will be finished even projects that have more than one target language.

Reports

To download the last generated report again, click the icon. The icon displays only after any report has been generated. Reports are available for another download only during the same connection session.

Combined metrics

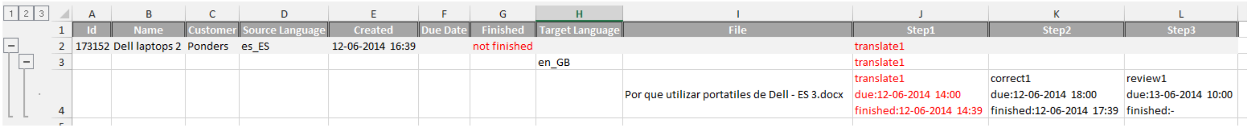
Selecting this option generates an Excel file report summarising the metrics of all the selected projects.

Project	Dell laptops 2, Indesign test, Dell			**Date**	15-06-2015 14:15	
Initial	**Segments**	**Words**	**Word %**	**Characters**	**Characters %**	**Characters excluding spaces**
Total count	246	3291	100	20104	100	17084
Non-translatable	2	5	0	32	0	29
Translation memory matching						
ICE match	3	68	2	454	2	389
Leveraged match	0	0	0	0	0	0
95-99 Fuzzy match	0	0	0	0	0	0
85-94 Fuzzy match	0	0	0	0	0	0
75-84 Fuzzy match	0	0	0	0	0	0
Machine translation	46	738	22	3809	22	685
Internal matching						
Repeat	10	10	0	70	0	70
95-99 Fuzzy repeat	0	0	0	0	0	0
85-94 Fuzzy repeat	13	230	7	1327	7	1115
75-84 Fuzzy repeat	4	22	1	147	1	128
No matching	168	2218	67	13580	68	11544
Progress - translate1						
Done	18	273	8	1778	9	1522
To be done	228	3018	92	18326	91	15562
To be corrected	0	0	0	0	0	0
Progress - correct1						
Done	7	165	5	1055	5	897
To be done	239	3126	95	19049	95	16187
To be corrected	1	6	0	35	0	30
Progress - review1						
Done	0	0	0	0	0	0
To be done	30	498	100	3021	100	2558
To be corrected	0	0	0	0	0	0

A typical combined metrics report

Project delivery dates

This Excel report shows the due date and time for each step in the workflow for each file and when the file actually finished each step. Steps that were finished late are highlighted in red.



The project delivery dates report

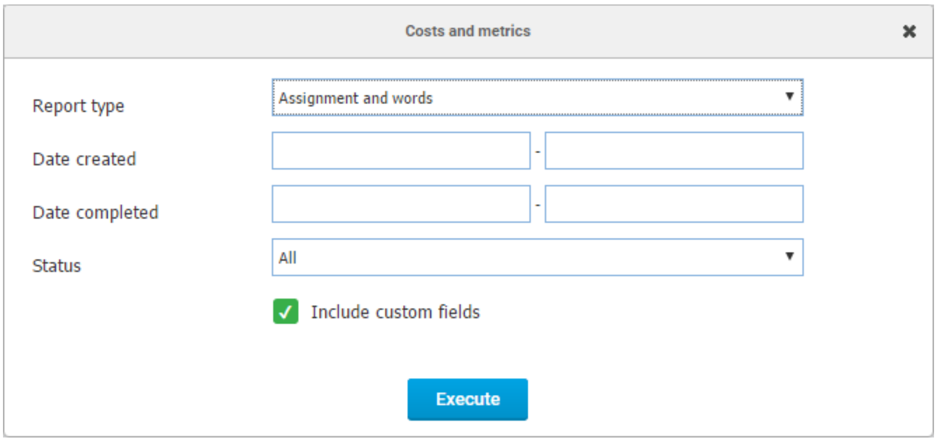
Statistics summary

This report includes the following fields:

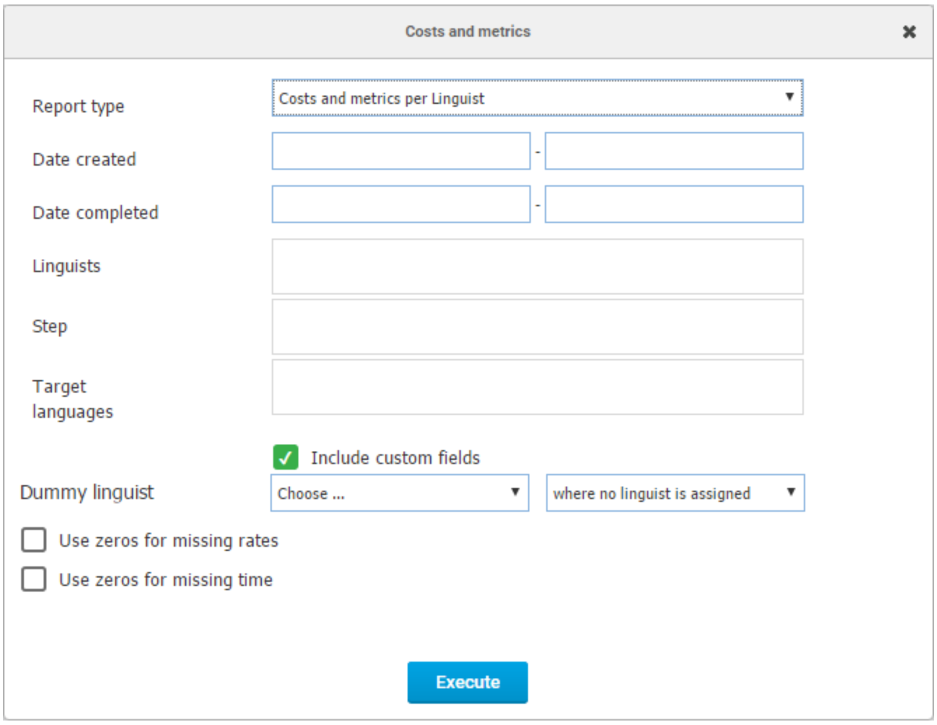
Year-month, Date, Year quarter, Customer, Project name, Language, To be done, New words, Matched words, Total count, ICE match, Leveraged match, 95-99% Fuzzy match, 85-94% Fuzzy match, 84-75% Fuzzy match, 95-99% Fuzzy repeat, 85-94% Fuzzy repeat, 84-75% Fuzzy repeat, Repeat, Machine translation, Non-translatable, No matching, alphanumicwords, measurewords, numericwords, punctuationwords.

Costs and metrics

You can generate the following kinds of Cost and metrics reports.

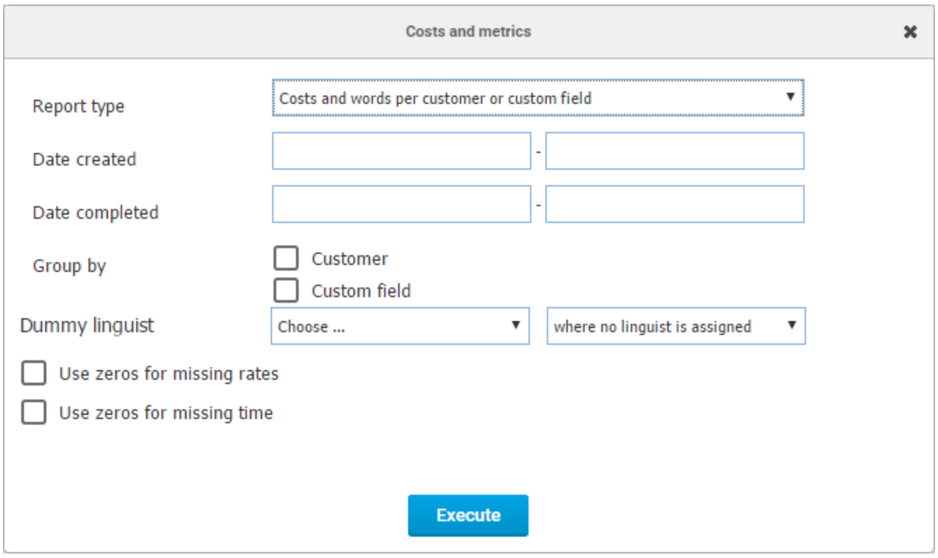


The Assignment and words report



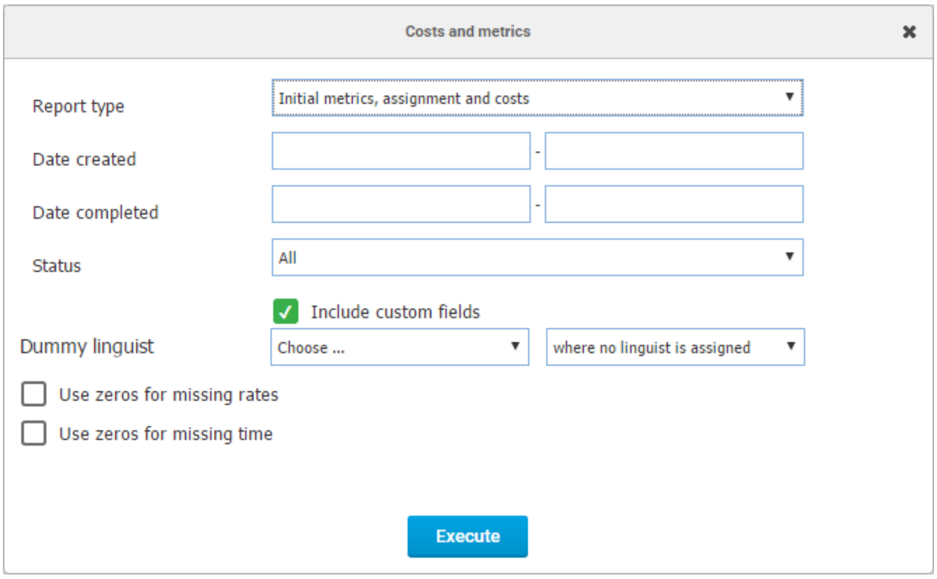
The report of Costs and metrics per Linguist

The costs and metrics reports provides additional filters: by linguist, step and language to narrow down the results of the report.



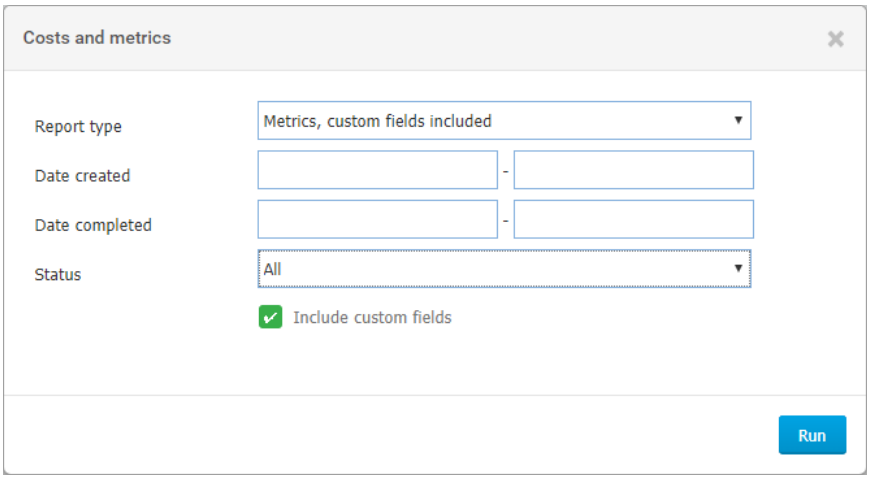
The report of Costs and words per customer or custom field

This report filters the data by either Customer or a Custom field.

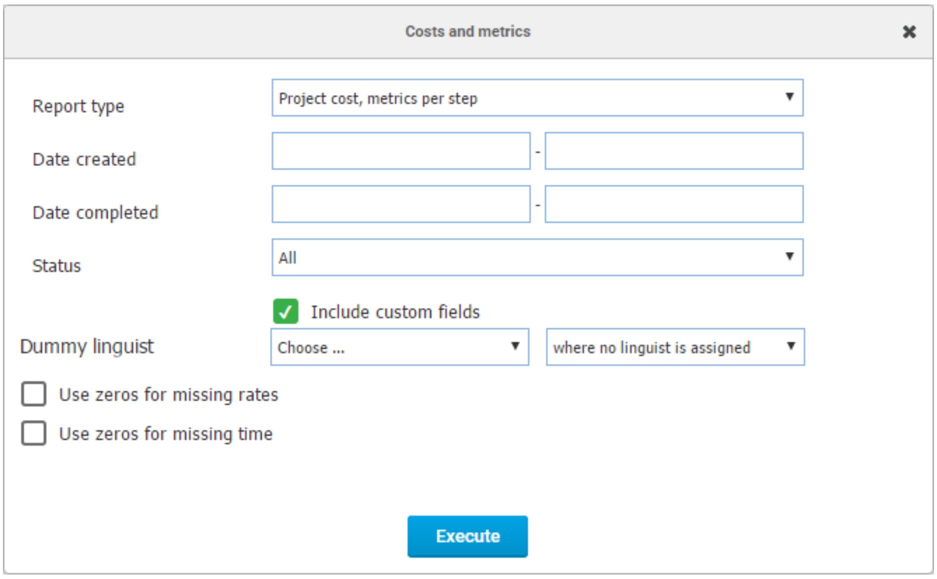


The report of Initial metrics, assignment and costs

This report provides a comprehensive choice of the most important project related data. You can check the box, Use zeros for missing rates or times when linguists do not have rate cards or time tracking set up. It also provides an option to choose a “dummy linguist” whose rate card settings can be used for cost estimation either for the entire workflow or only where no linguist is currently assigned.

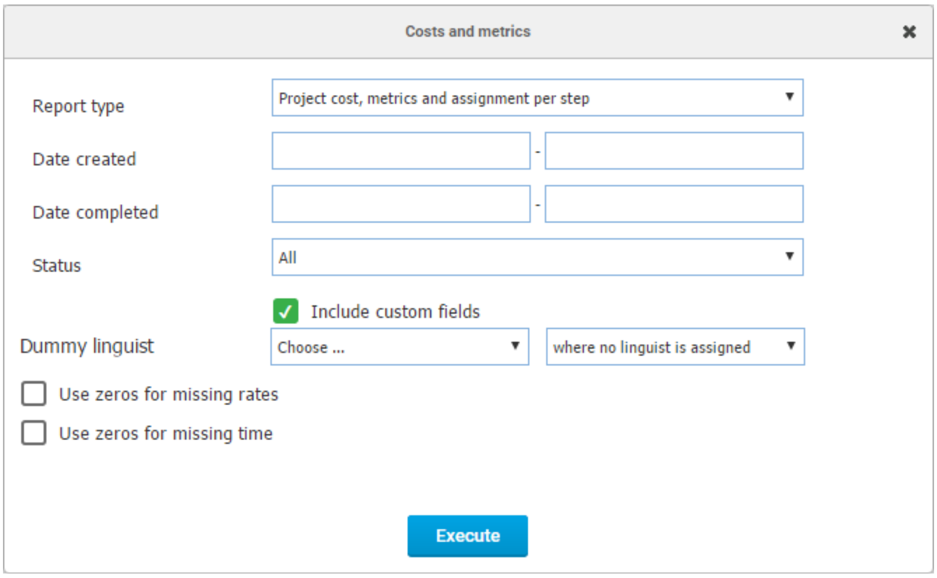


The report of Metrics, custom fields included



The report of Project cost, metrics per step

This a comprehensive report that contains the basic information about the project.

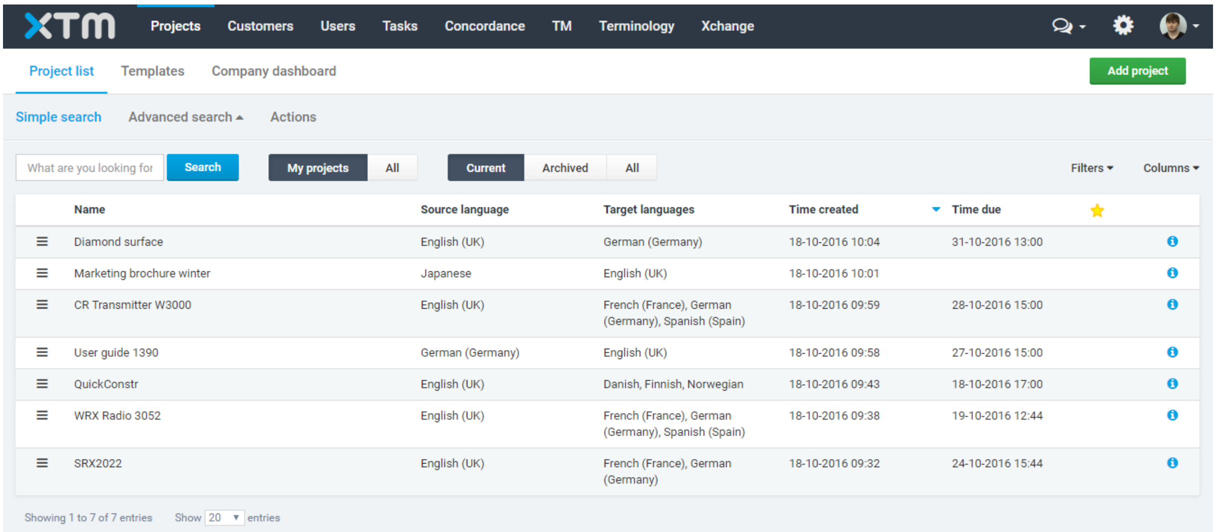


The report of Project cost, metrics and assignment per step

This report is similar to the report of Project cost, metrics per step but it also includes information about the assignee.

Reviewing Projects

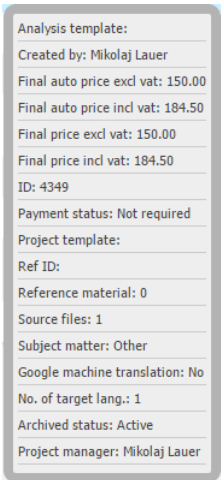
Click on the Projects tab and you will see a list of all your current projects. You can view other projects by using the features on the advanced search tab. You can sort the projects by clicking on any of the column headers.



Project listing

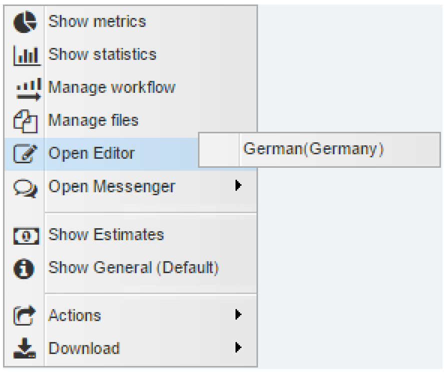
Hovering the mouser over the icon in the right hand column displays additional information about the project including:

- XTM ID
- Reference ID
- Subject matter
- Google machine translation
- Creation date / time
- Created by
- Project manager
- Due date
- Final price excl. VAT
- Auto price excl. VAT
- Final price incl. VAT
- Auto price incl. VAT
- Payment status
- Number of reference material files, source files and target languages.



Additional information about projects

Clicking on the icon in the left hand column displays menu which provides access to view and manage the project.



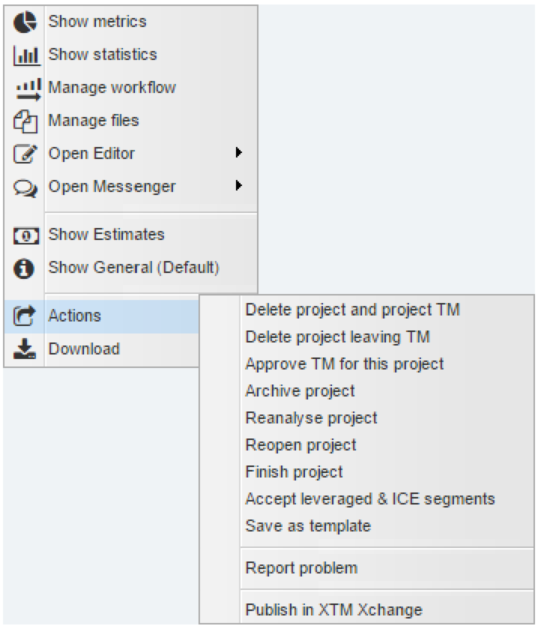
Context sensitive menu for projects

This menu allows you to carry out the following tasks for each target language in the project:

- View the metrics.
- View the translator statistics
- Manage the workflow
- Manage the project files - generating and downloading the target files
- Open XTM Editor
- Open XTM Messenger

Then for the project in general you can:

- View the project estimates
- View the general details of the project.
- Carry out a number of actions on the project.
- Download reports

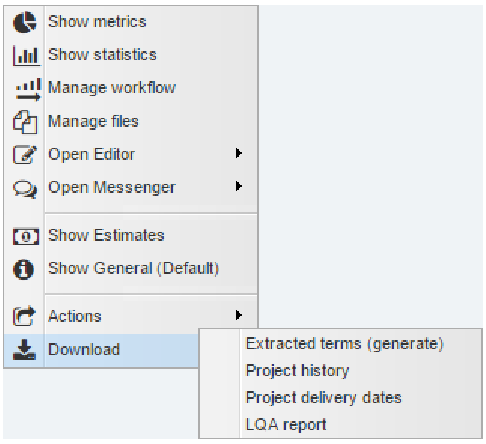


The Actions menu for projects

The actions that you can take are*:*

- Delete the project with any TM that you generated with the project.
- Delete the project leaving the TM in place.
- Approve the TM even if the project has not been completed.
- Archive the project. This removes it from the current list of projects, but it may be restored at a later date.

- Reanalyse the project – This recalculates the matching and metrics but leaves the statistics and workflow allocations unchanged.
- Accept leveraged & ICE segments – This turns their status from orange to green and any green segments are saved in the TM database as approved TM
- Confirm the project.
- Save the settings from this project as a template for use in future projects.
- Report a problem you are experiencing with the project. Selecting this option brings up a window to enter details about the problem. XTM sends this message to the XTM support team together will all the relevant information about the project to ensure a swift resolution.
- Publish the project in XTM Xchange – See chapter 9 for more details about XTM Xchange.



The Download menu for projects

The reports that you can download are all in Excel format.

- Extracted terms: A list of candidate terms that was automatically extracted from the source file during analysis. The column headers for the terms report are:
  - Source language
  - Surface Forms – this is the form in which the term appears in the source text.
  - Frequency – the number of times the term appears in the source text
  - Remarks
  - Context – the context in which the term appears in the source text
  - Target language – This is intentionally left blank so that a translator can insert the translation of the term before the terms are imported into the term manager.

- A project history showing the time when any action was taken on the project and who took the action. The column headers in the report are:
  - Date [in Western European Time, WET]
  - User ID
  - User name
  - LSP ID – used if the project was subcontracted.
  - LSP name – used if the project was subcontracted.
  - Job ID
  - Project ID
  - Project name
  - Target language
  - File name
  - Action name
  - Additional information

- A summary of when each step in the work flow was finished for each file in the project and how this compares to the due dates. The column headers in the report are:
  - Id – The project ID
  - Name – the project name
  - Customer

- Source Language
- Created – the date and time the project was created
- Due Date - the date and time the project was due
- Finished - the date and time the project was finished and if the project is not finished it will say “not finished”. Overdue items are shown in red.
- Target Language – The target languages can be expanded or collapsed using the little + in the left hand column of the spreadsheet
- File – The files for each target languages can be expanded or collapsed using the little + in the left hand column of the spreadsheet
- Step1, 2, 3 etc. For each step in the workflow and for each target language the report shows the due date time and the finished date time. Overdue items are shown in red.

- The LQA report. For a detailed explanation of the LQA process and report see the LQA section in this manual

XTM Messenger

XTM Messenger simplifies and accelerates the exchange of information between project members. Project managers can open chats with all linguists, linguists from a specific language or open custom chats with only select users. Linguists can open chats with the project manager who created the project, with other linguists translating for the same language or with all linguists involved in the project. An administrator can enable or disable XTM Messenger for the entire system on the Configuration tab.

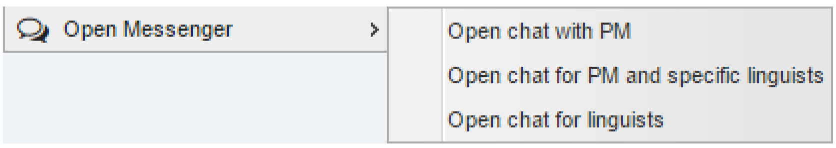
Nickname and avatar

You can set a nickname and an avatar that will display next to your messages sent in a chat, on the Configuration tab, on the User Details section. If you do not configure a nickname, your first name will be displayed in the chat window.

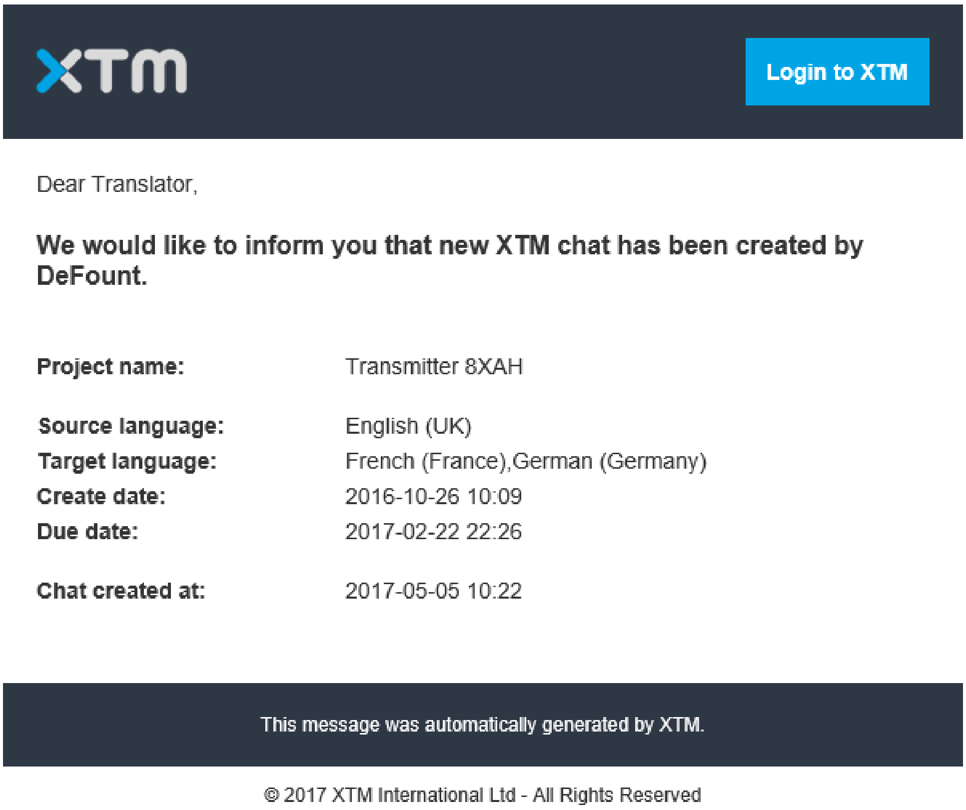
Chat configuration

To open XTM Messenger settings, click the XTM Messenger icon and then the cog wheel. Project Managers have the following settings:

- Enable emails about new chat created: all chat participants receive notifications about newly created chats
- Allow linguists to create chat without PM: the option to open chat for linguists is then enabled



XTM Messenger – Open chat for linguists



Login to XTM

Dear Translator,

We would like to inform you that new XTM chat has been created by DeFount.

Project name:	Transmitter 8XAH
Source language:	English (UK)
Target language:	French (France),German (Germany)
Create date:	2016-10-26 10:09
Due date:	2017-02-22 22:26
Chat created at:	2017-05-05 10:22

This message was automatically generated by XTM.

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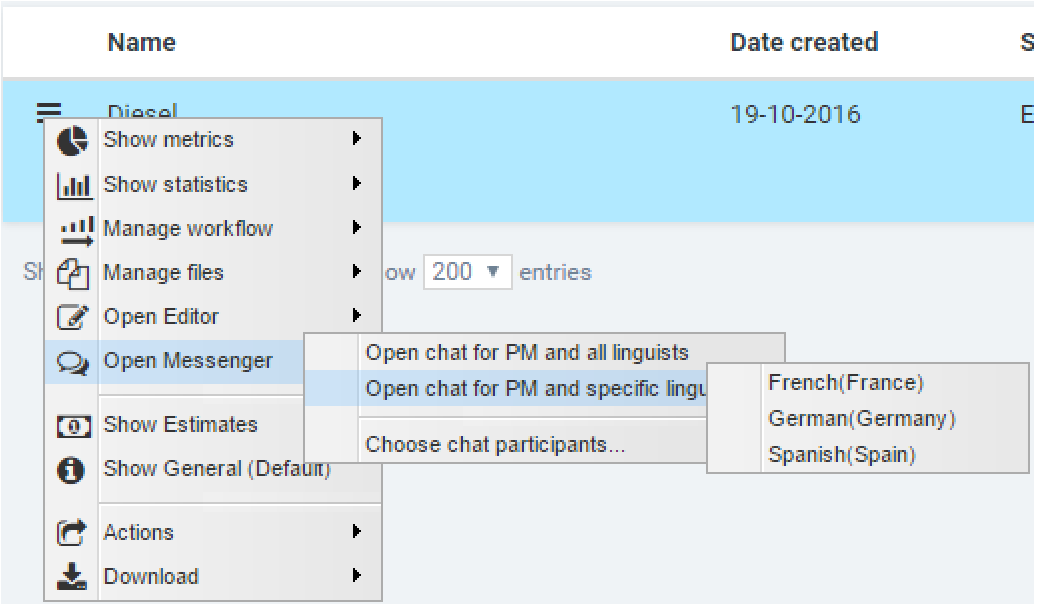
Email notification about a new chat created

Opening a chat in XTM Messenger

The options to open chats are available in the context menu on the lists of projects and tasks. Project Managers can choose the options to:

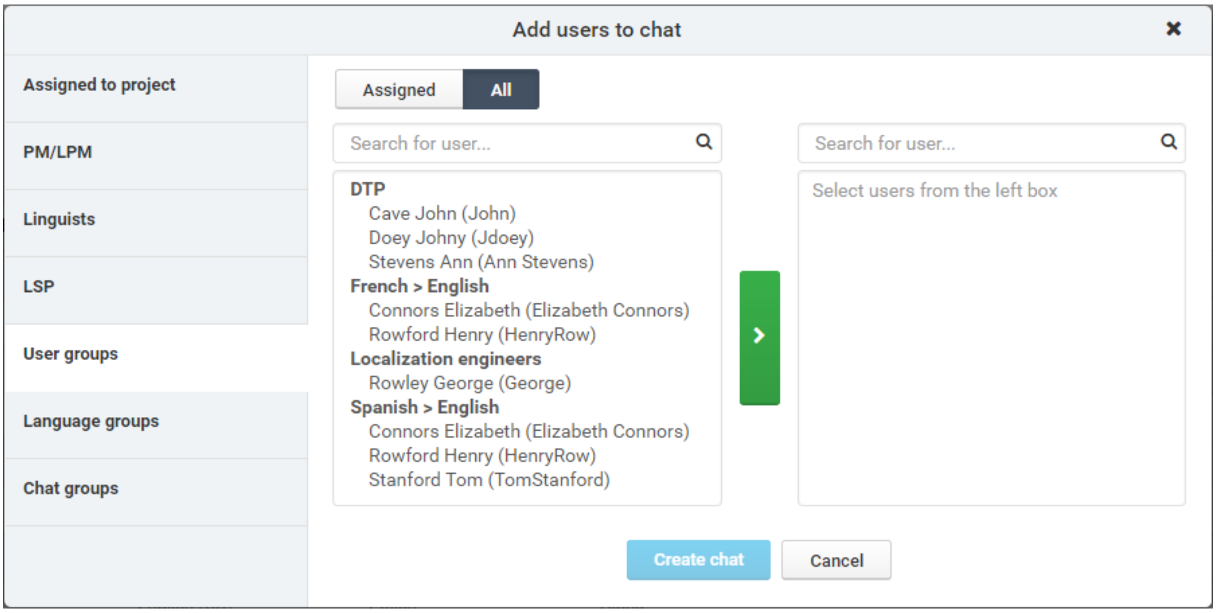
- Open chat for PM and all linguists
- Open chat for PM and specific linguists
- Choose chat participants…



Opening XTM Messenger by Project Managers

Choosing chat participants

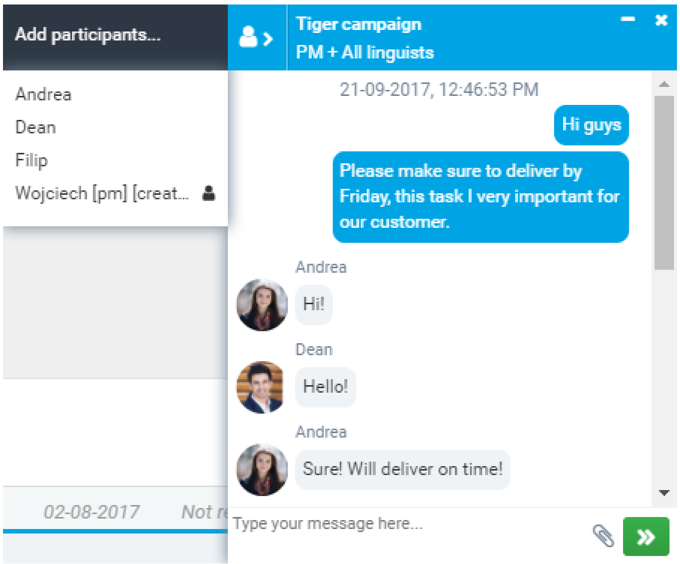
You can create a custom chat and decide who to include in the conversation. A pop-up window displays all users, LSPs and groups divided into categories that you can add to the chat. Additionally, you can easily select to display only those assigned to the project or All.



Choosing chat participants

Chat window

In the top bar of the chat window that opens you can find the name of the project relating to the chat and who is involved in the conversation. You can add new users to a chat or see the users participating in the chat after clicking the icon. Pictures displayed next to messages are the avatars specified in User details or User editor. Type your message in the text input field and click the green button or press Enter to send it.

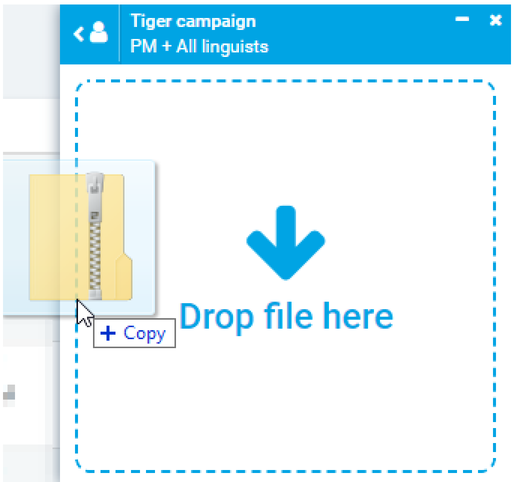


A chat window for a project

You can have multiple chat windows open at the same time. If you open a new browser window with XTM, chat windows opened in the previous tabs or windows will become inactive. Chat windows will remain active in the latest opened window or tab.

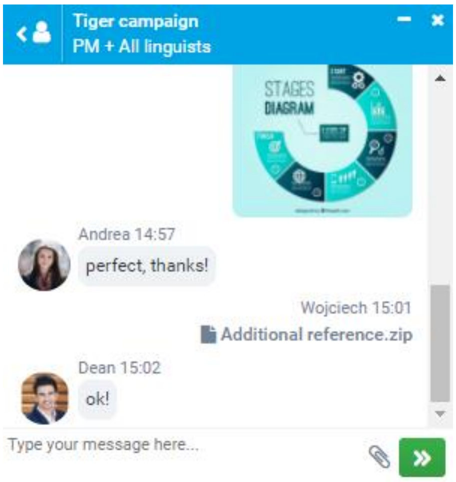
Sending files using chat

XTM Messenger supports file transfer through the chat. Click the paperclip icon to open the file selection window. Alternatively, you can drag and drop a file to send it. The maximum file size for transfer is 10 MB.



Sending a file through a chat using the drag and drop method

Images sent through the chat are presented as thumbnails and display in full size or full screen when clicked. To download an image, right click it and choose Save image as… Files other than images have their name and extension displayed in the chat window and immediately download the transferred file when clicked.



An image and a package transferred through a chat

Unread messages

The XTM Messenger icon is located in the top right corner of the screen. You can use it to open existing chats. When you have unread messages, XTM Messenger will display the number of unread messages in a small red circle on the XTM Messenger icon. A red dot next to a chat indicates there are unread messages.

Unread messages in XTM Messenger chats

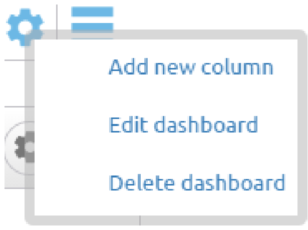
Dashboards

Dashboard Overview

The dashboards provide a management overview of your business. You can create multiple dashboards each of which contain a number of graphs or widgets displaying your chosen information. A dashboard can be given a custom name and docked to the submenu bar. The graphs are displayed in a number of columns.

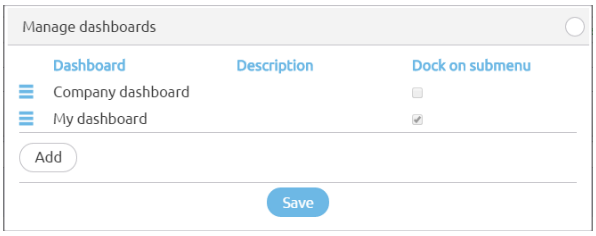
The dashboards are administered using the icons in the title bar.

The  icon displays a menu that allows you to add a new column, edit the name of the dashboard or delete it.



Dashboard settings menu

The  icon displays the pop up window below where you can, add, dock, load, edit or delete a dashboard by clicking on the menu icon.



Manage Dashboards window

The widgets are managed using the icons in the widget menu itself.

 Refreshes the data on the widget

 Displays the configuration settings for the widget

 Deletes the widget

Widget Settings

There are 4 settings that allow you to configure the widget. Each setting has a check box that when checked means this setting will be permanently visible

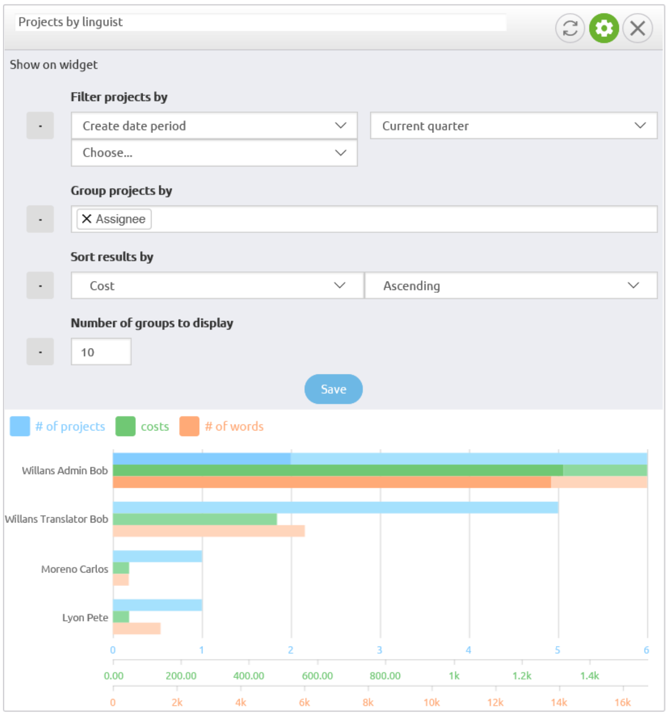
- Filter projects: This field allows you to select which projects are used to prepare the data
- Group projects by: Set this parameter for determining the y axis of the graph
- Sort results by: the field entered here determines how the groups are sorted. You can

choose if the values are sorted with the values ascending or descending.

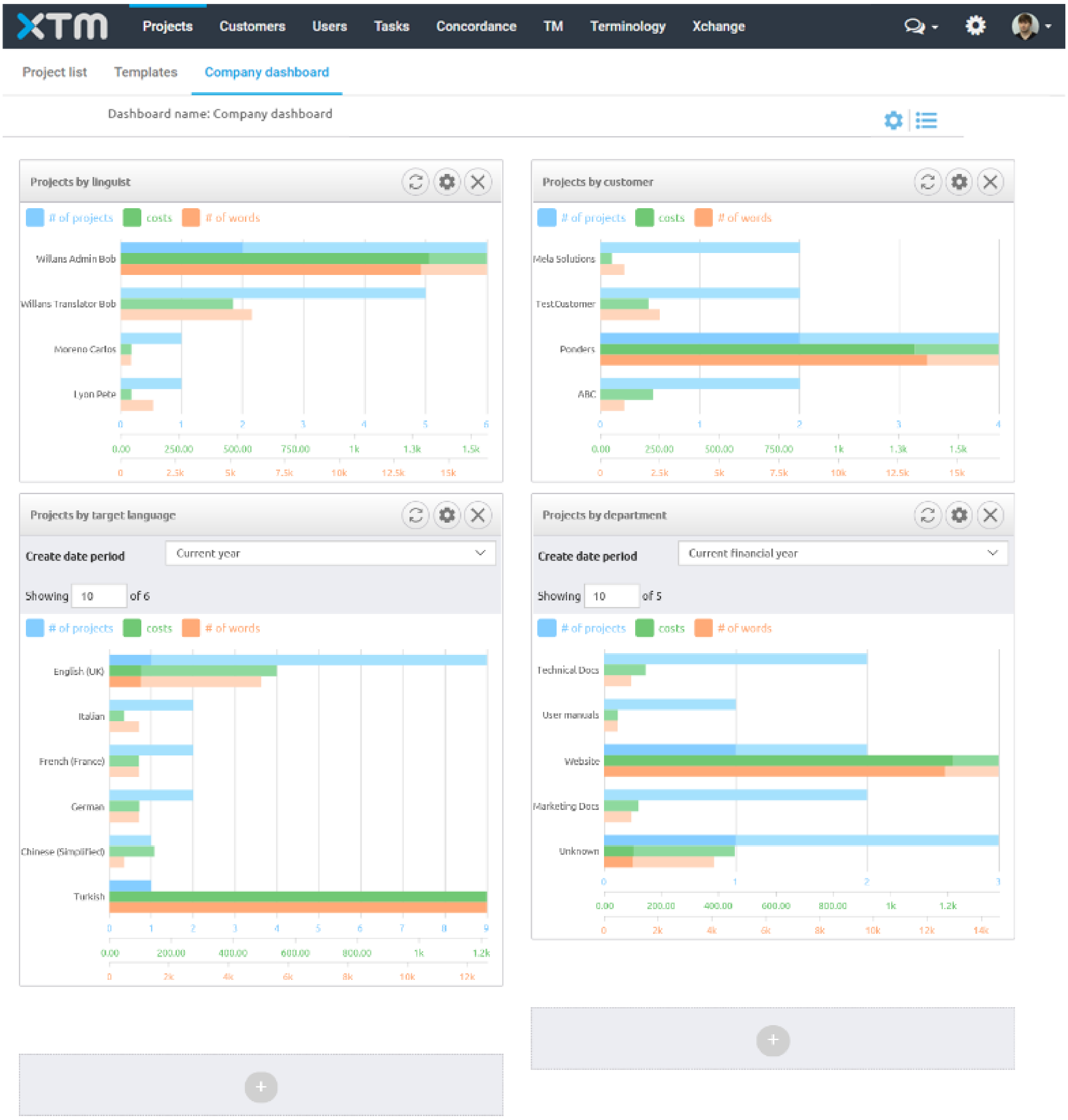
- Number of groups to display. This parameter sets the number of groups on the graph. By default, this value is set to 10. Groups with a null value are not displayed.

Finally, you can set the name of the widget by typing it in the title bar.

When you have entered your preferred settings click the save button.



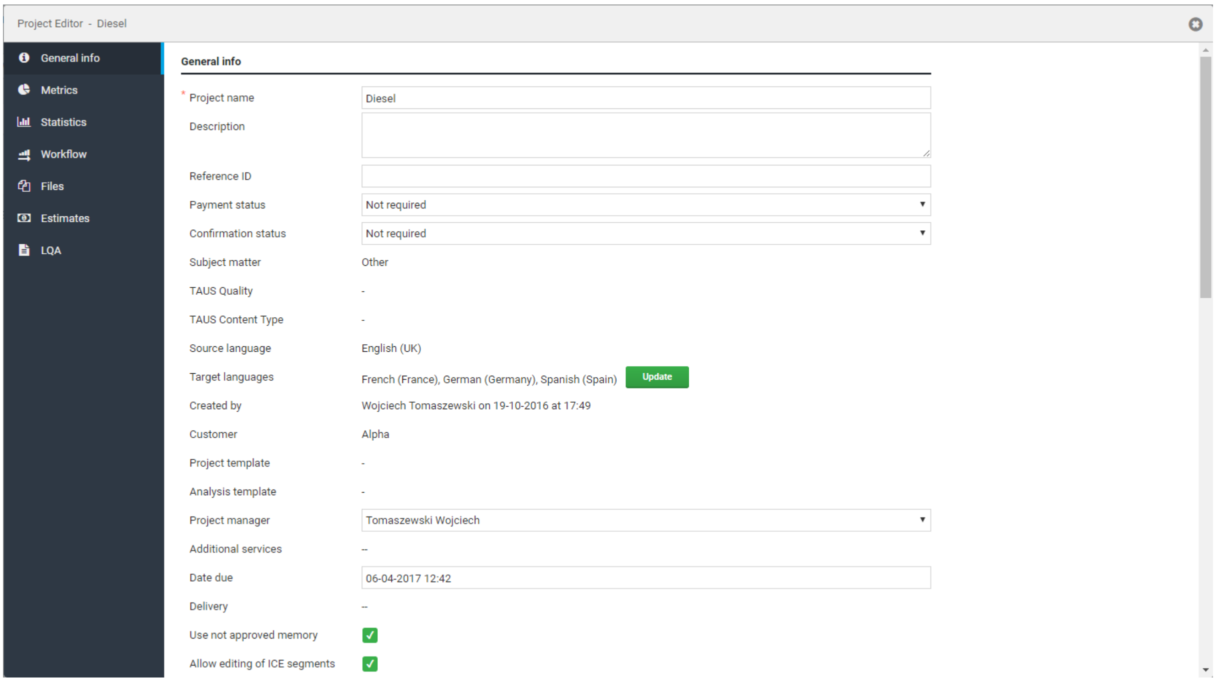
Configuring a widget



Typical Dashboards

Project Editor

When you click a project, a screen with details and settings is displayed.



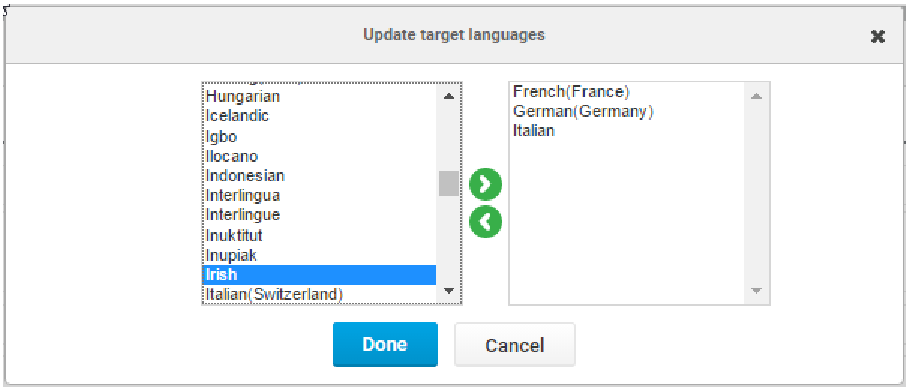
Project editor – General info

Project Editor - General info

This tab provides ability to view and edit much of the information and many of the settings relating to the project.

The following items can be edited:
Project name, description, reference ID, payment status, confirmation status, target languages, project manager, delivery due date, MT use, TM use, which customer's TM and terminology to use and monitoring of target length.

Next to the list of target languages there is an update button that allows you to edit the list. Clicking on this button displays a window to add or delete languages.

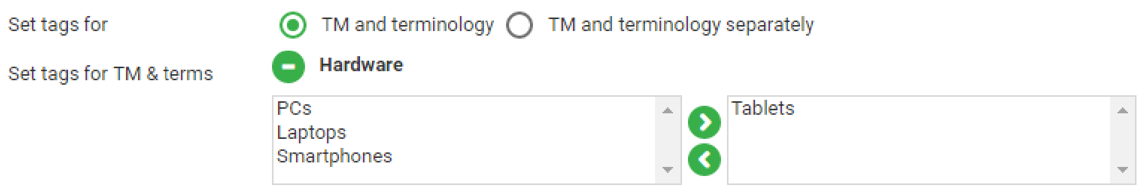


Adding or deleting target languages from a project

When the due date auto calculation feature is enabled, there are additional due date types available for reference.

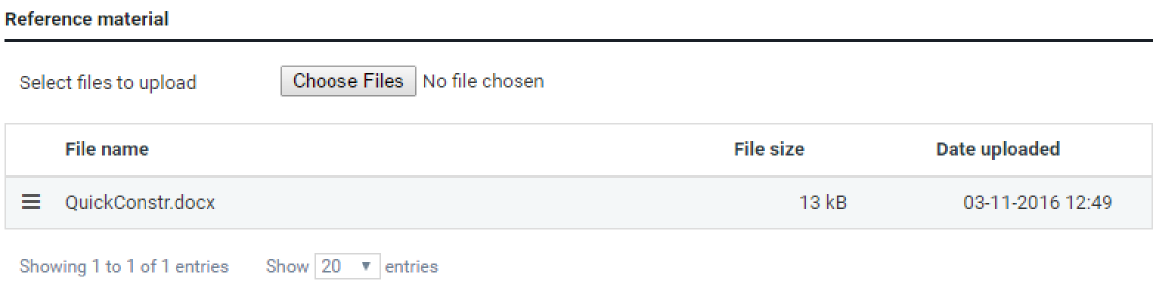
Additional due date types in a project with automatically calculated due dates

It is possible to edit the TM penalty profile and the TM tag group from within the General page of the Project Editor.



Editing the TM penalty profile and the TM tag group in the Project Editor

At the bottom of the general window there is a section to view and update the reference material. The menu icon in the left hand column allows the reference material to be deleted or downloaded.

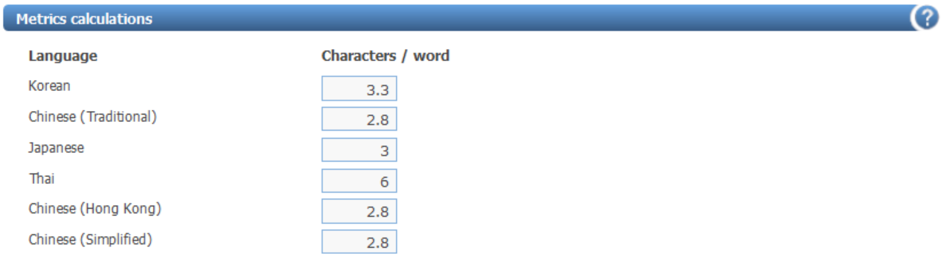


The Reference Material section in the Project Editor

Project Editor - Metrics

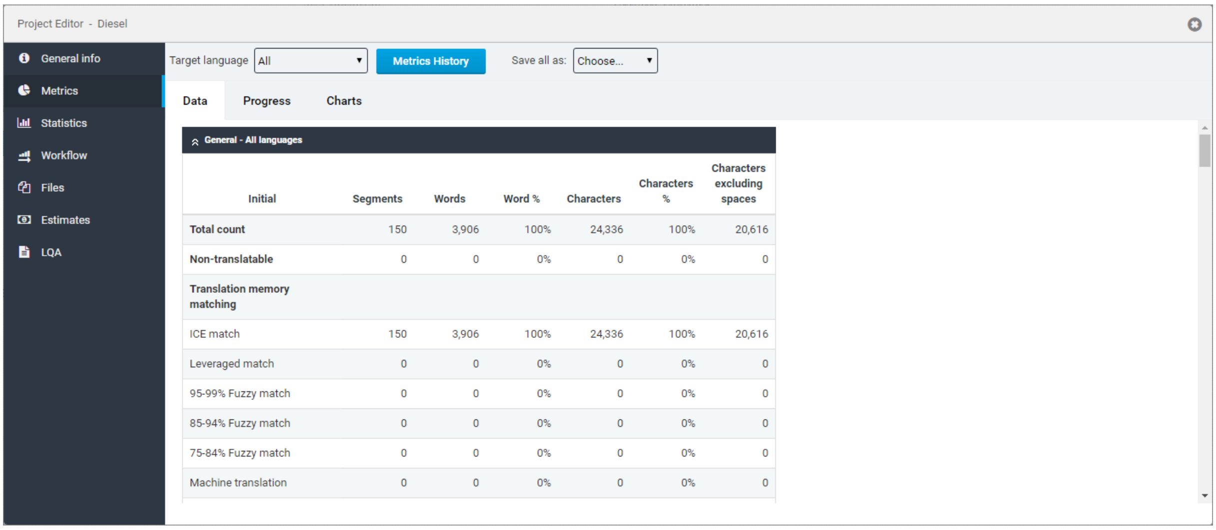
This tab shows the metrics for each language in the project. The metrics are updated in real time and show the exact progress of the job through translation, correction and review. The values can be downloaded to the local PC in either CSV or .XLS format by clicking on the relevant button at the foot of the window.

For character based languages the number of “words” is estimated by dividing the number of characters by a factor. These factors are set on the Configuration tab > Settings > Translation. By default, the values are:



Editing the characters per word for Asian languages.

The number of characters in each segment is divided by the relevant factor and then rounded up to the nearest integer to give the number of words in the segment. Then the number of words in each segment is summed to give the total word count in the document.

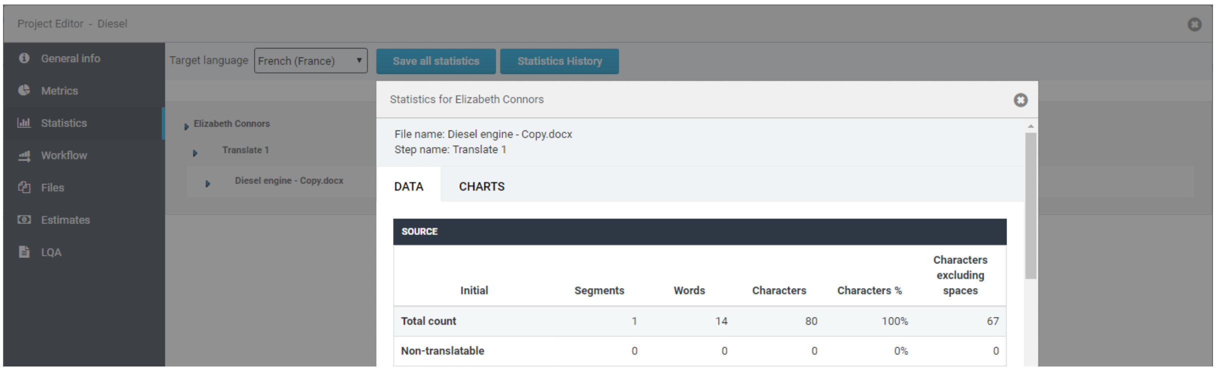


A typical metrics window

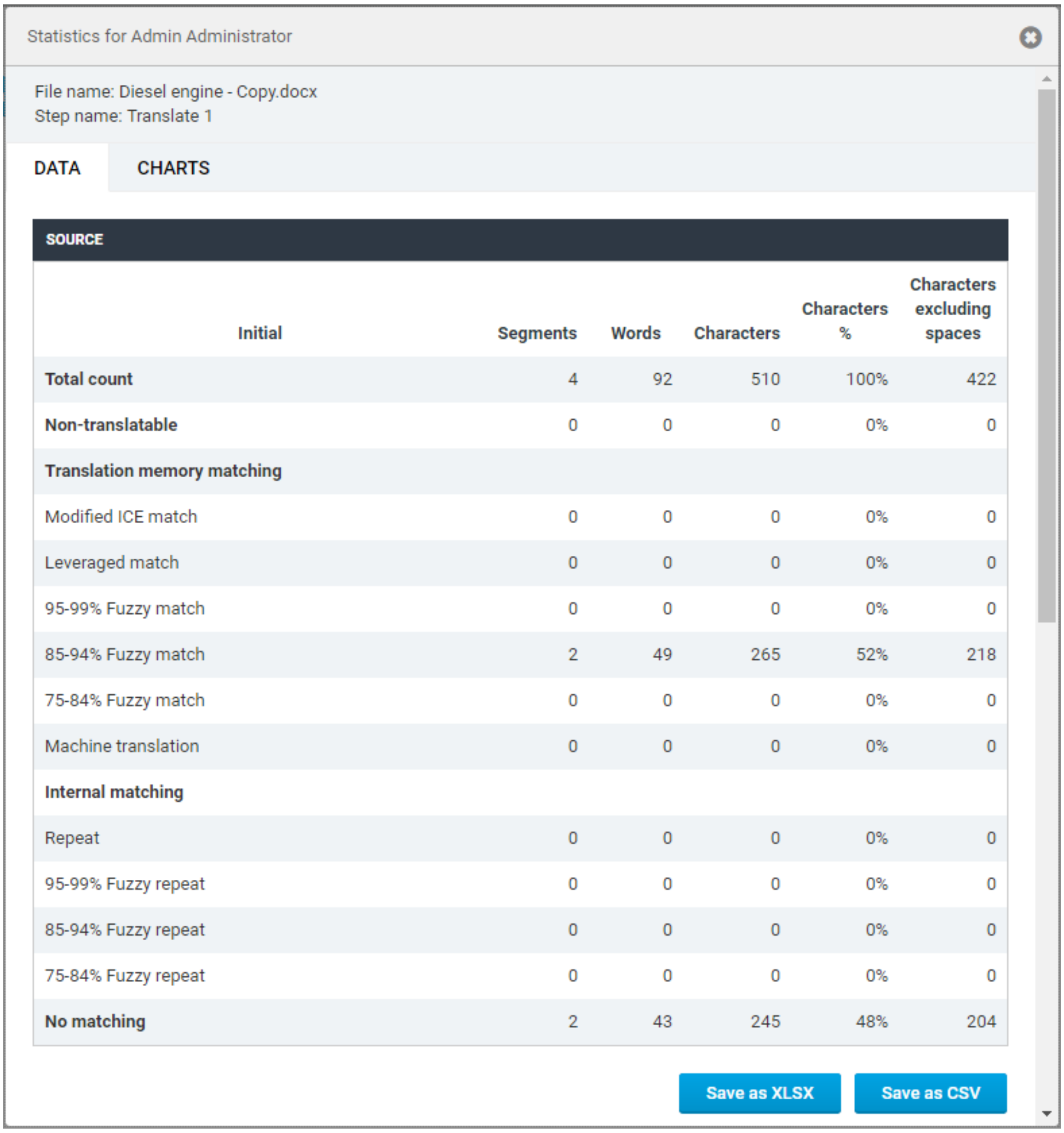
The machine translation category in metrics as its name suggest says how many segments, words and characters have been translated by MT. You need to have one or more of the MT integrations activated for this to show results. By default all the figures are set to zero. If you use Asia Online MT the text without TM matches or repetitions are sent to be matched during analysis. Thus the figures become visible after project creation. For all the other types of MT that can be used with XTM we send the unmatched segments one by one during translation. Therefore the figures for machine translation in metrics are updated on the fly as the linguists do their work.

Project Editor - Statistics

The statistics tab provides information about the quantity of translation completed by each linguist for both the source and target in a project. The data is presented for each linguist, workflow step and file and also when there are multiple files in a project as a total for each linguist per workflow step. The data can be downloaded as a XLSX or CSV file. The source and target statistics are updated automatically when a segment status is set to done.



Statistics window.



Statistics for Admin Administrator

File name: Diesel engine - Copy.docx
Step name: Translate 1

DATA CHARTS

SOURCE

Initial	Segments	Words	Characters	Characters %	Characters excluding spaces
Total count	4	92	510	100%	422
Non-translatable	0	0	0	0%	0
Translation memory matching					
Modified ICE match	0	0	0	0%	0
Leveraged match	0	0	0	0%	0
95-99% Fuzzy match	0	0	0	0%	0
85-94% Fuzzy match	2	49	265	52%	218
75-84% Fuzzy match	0	0	0	0%	0
Machine translation	0	0	0	0%	0
Internal matching					
Repeat	0	0	0	0%	0
95-99% Fuzzy repeat	0	0	0	0%	0
85-94% Fuzzy repeat	0	0	0	0%	0
75-84% Fuzzy repeat	0	0	0	0%	0
No matching	2	43	245	48%	204

Save as XLSX Save as CSV

Statistics detail

Before a project is updated by uploading a new or modified source file the statistics will be saved to the Statistics History. Clicking on the Statistics history button opens a new window where you can access the selected historic statistic files by clicking on the relevant line.

Project Editor - Comparison of Metrics and Statistics

SOURCE statistics provide information about the number of segments, words, characters and characters as a percentage in the source text that have been translated in a specific workflow step by a specific user.

TARGET statistics provide information about the number of segments, words, characters and characters as a percentage in the target text translated in a specific workflow step by a specific user.

Metrics provide information about the number of segments, words, characters and words or characters as a percentage for the translated text and text to translate for the whole project.

It means that Statistics and Metrics indicate the same values for a step performed by a single user, for example:

20 source no matching words translated into 25 target words by a user called *Linguist 1*
Metrics:
 20 no matching words
SOURCE statistics:
 20 no matching words
TARGET statistics:
 25 no matching words

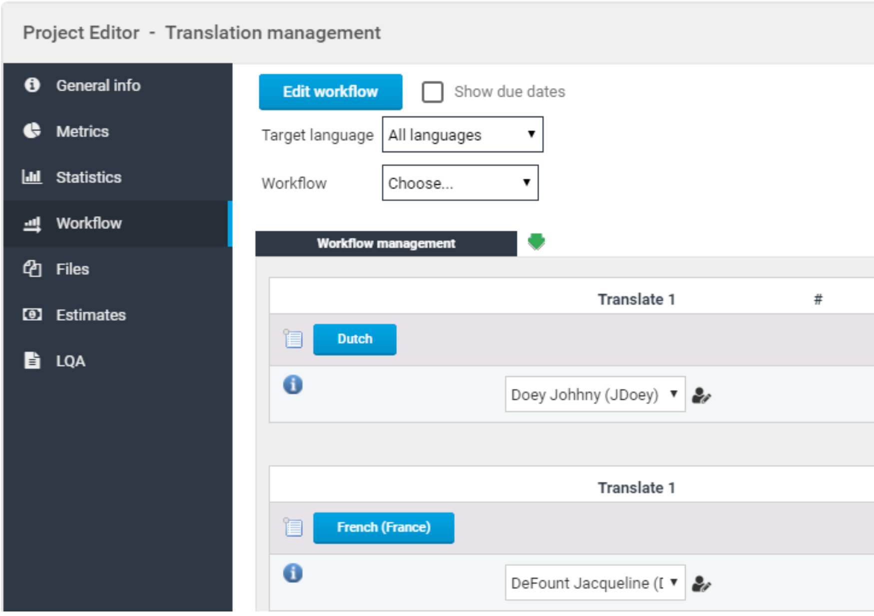
Statistics and Metrics indicate different values when multiple users are involved in a step including administrators and project managers, for example:

8 source no matching words translated into 11 target words by a user called *Linguist 1*
12 source no matching words translated into 14 target words by a user called *Linguist 2*
Metrics:
 20 no matching words
SOURCE statistics:
 Linguist 1: 8 no matching words
 Linguist 2: 12 no matching words
TARGET statistics:
 Linguist 1: 11 no matching words
 Linguist 2: 14 no matching words

Metrics and statistics will also differ if machine translation is used. In this case the original metrics may show segments/words/characters in the no matching category and fuzzy matching rows. After translation, depending on settings, some text may have been machine translated and so now appears in that row.

Project Editor - Workflow

Clicking on the Workflow tab shows a project overview window. When languages have different workflows, there is an additional dropdown field that you can use to filter the displayed languages. By filtering languages, you can easily batch update due dates for languages with the same workflow.



Workflow overview

This window displays one row for each target language where you can allocate translation resources to all the files for that language.

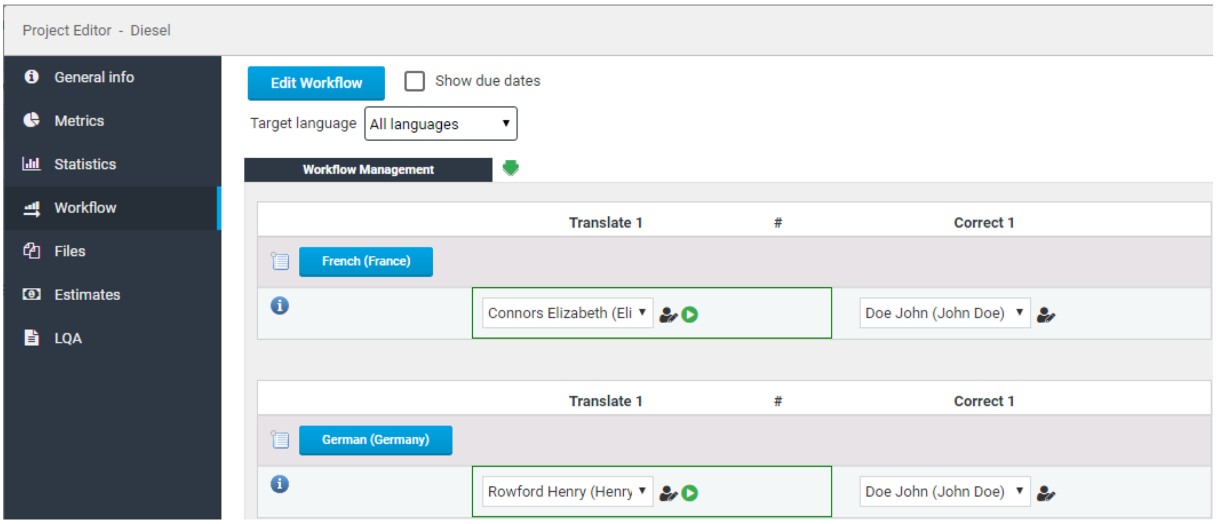
If you mouse over the information icon it shows you the total number of files, and of these how many were analysed successfully, empty, not supported or had errors. If you click on the language button or alternatively select a language from the pull down menu then you can drill down to see the individual files.

The change workflow button at the top allows you to change the workflow for the whole project by adding or deleting steps, setting the transition and when the TM is approved. The workflow can be changed for the whole project or for a single language.

If you have allocated resources to a language you can start the workflow for that language by clicking on the start button. If you click the Save button the resources entered will be saved but the workflow will not be started.

On this page project managers can carry out many functions relating to the workflow. You can:

1. Split the file into bundles
2. View the details of linguists
3. Allocate linguists to the various tasks
4. Move the jobs forwards and backwards in the workflow
5. Download and upload XLIFF files
6. Roll the project backwards or forwards
7. Open the editor in either a read write or view only mode to view the task
8. Run a selection of reports about the project.



Applying roles to Workflow stages

Splitting the file into bundles

It is possible to split a file into bundles of segments so that multiple linguists can work on the file concurrently so reducing throughput time. Initially the file is displayed with all the text segments in one bundle. To split the file into multiple bundles enter a lower number in the right hand box under the file name. As you click away from the box, XTM automatically creates a second bundle with the remaining segments.

Allocating linguists to tasks

The top line of the workflow management is a general line for the entire project. Using this line it is possible to allocate a translator or reviewer to all the files or bundles in the project in one go. Use the icon to replace all the names that have been already set. The lines below relate to the individual files or bundles in the project.

To allocate a linguist:

1. Select the name from the pull down list on each task. Note only linguists with the correct language pair will be displayed.
2. Click on the icon to open a window listing the details of the possible linguists. Then double click on the required name.
3. Select a name from the top pull down list to enter that name in all empty tasks, for all files, for that step.
4. Select a name from the top pull down list and click the replace all icon to enter it in all tasks, for all files, for that step

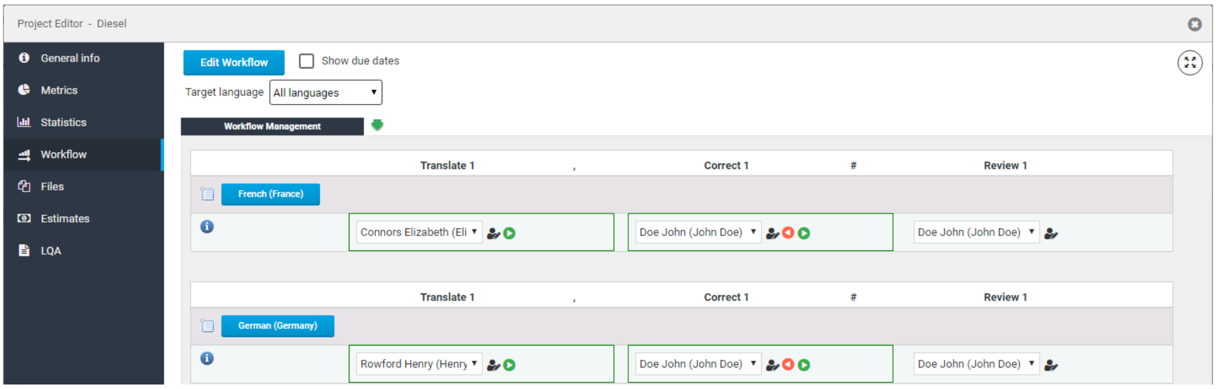
Saving and starting the workflow

When you have allocated linguists to the various tasks you must click the save button before navigating away from the screen.

When you want to start the workflow, click the start button. Note depending on which workflow you have selected a number of tasks will have a green surround. This indicates that the tasks are active and the linguists can work on them.

Finishing and rejecting tasks

The PM can move the file onto the next step in the workflow or send it back to the previous step.

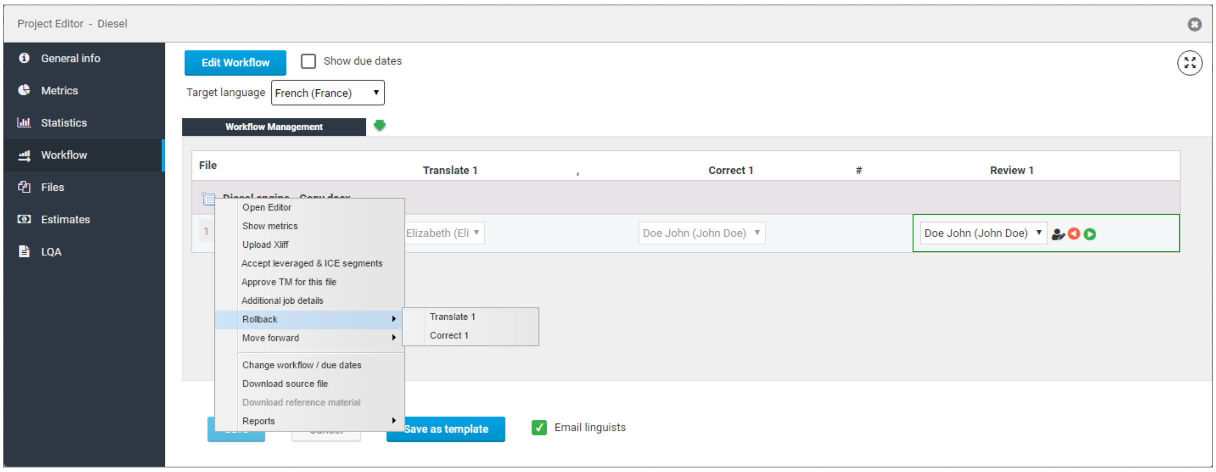


Managing the workflow

In the above image the tasks for segments 1 -15 are active in Translate 1 and Correct 1. If you wish to finish either of them and move them onto the next step click the green arrow. Similarly, if you wish to send a task back to the previous step, click on the red arrow. Remember to click the save button when you have moved the file. To finish a project that is partially complete, manually move the project through all the steps in the workflow including the last step.

Move forward and roll back

It is also possible to roll back the project to a previous step in the workflow. To do this select Roll back and then the desired step from the context menu in workflow management. When you choose this option XTM will revert the file to the state at the end of the selected step. Any changes that have been made in subsequent steps are removed and as long as the source and target segments are different in the earlier step any TM that is has been created is overwritten.



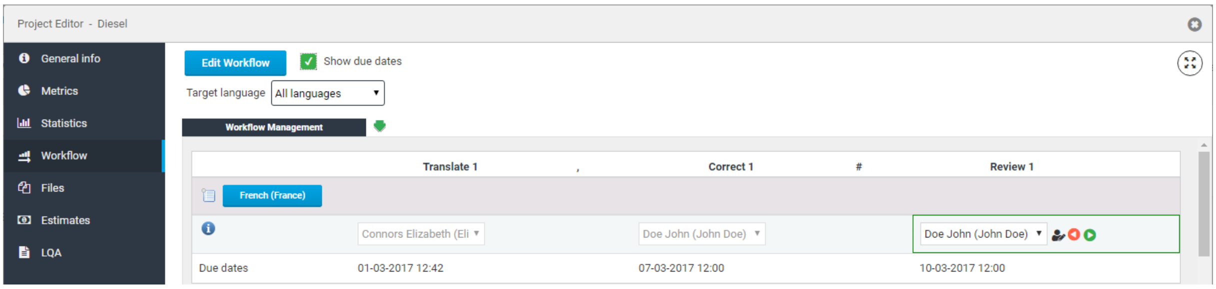
The roll back context menu

It is also possible to move the file forward to a subsequent step in the workflow. To do this select Move forward and then then the step.

Modifying the workflow and setting dues dates for steps

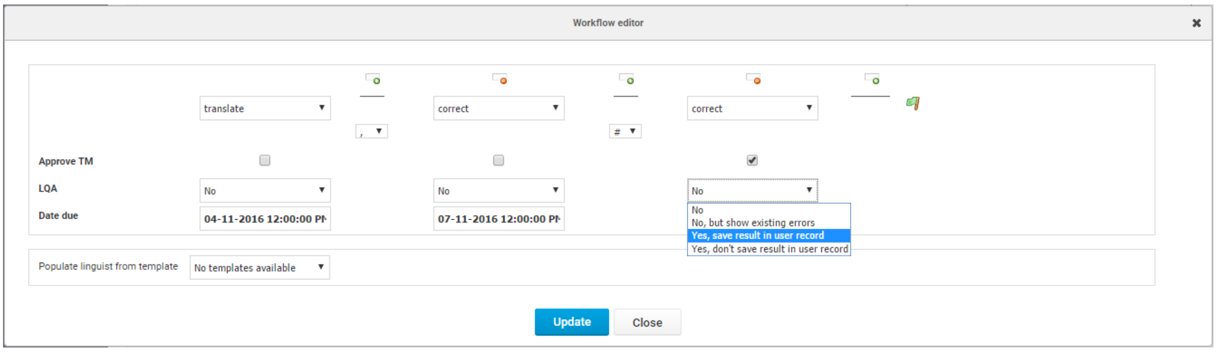
Once a project has been created the workflow can be modified and due dates set. You can do this on a project, language, group or file level. Due dates can be updated in one go for all languages with the same workflow

To view any due dates that have been set, check the “Show due date” box. This display the dates below each step highlighting any expired dates in red.



Workflow showing dues dates

In order to edit the workflow or to add or modify due dates click on the “Workflow / Due dates” button. This brings up the following window:



The manage workflow window

This window allows you to:

- Add additional workflow steps
- Determine the functionality of workflow steps
- Determine the blocking mechanism between steps
- Delete workflow steps
- Determine the LQA function for each step individually:
    - No – LQA is disabled
    - No, but show existing errors – LQA only displays errors reported in previous steps
    - Yes, save result in user record – LQA result for the translator from the previous step is saved on the Rating tab in the Edit user window
    - Yes, don’t save result in user record – LQA is enabled but results are not saved with linguists
- Determine at which step the TM is approved. By default the TM for each segment is approved during the last step in the workflow when the status for each segment is changed to done.
- Set the due date for each step in the workflow.

To add a workflow step firstly decide where you want to insert the step and then click on the icon. A new step will appear and then select the function of the step from the pull down menu.

Selecting the function of a step.

Next determine the blocking mechanism between the steps by selecting the appropriate symbol from the pull down menu.

Selecting the blocking mechanism between steps.

As described previously:

The "," means that steps can be processed simultaneously.
The "->" means that the next step cannot be started until the previous step for that bundle is finished.
The "#" means that the next step cannot be started until the previous step for all the bundles have been completed.

To delete a step in the workflow click on the icon

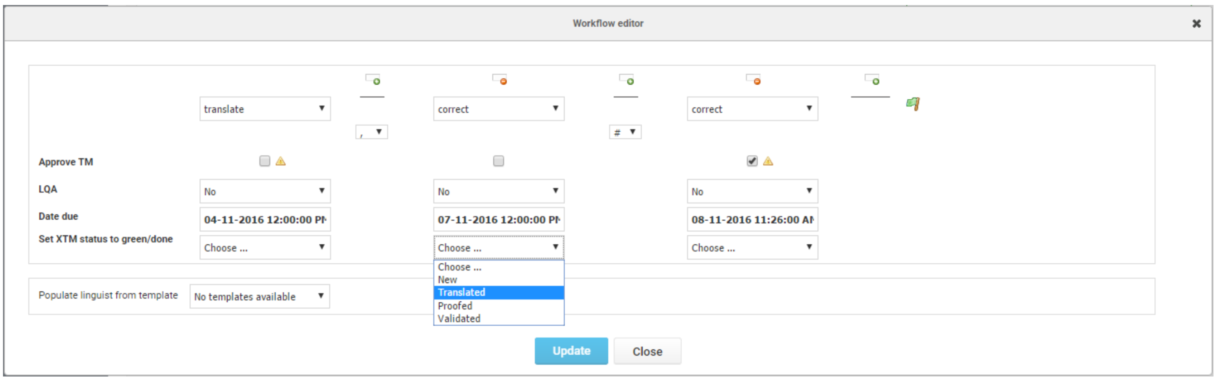
To determine at which step in the workflow the TM is approved click the relevant check box.

To enter a due date and time click in the blank cell and select a date from the pop up calendar. Use the sliders at the bottom to set the time. Dates and times are displayed in the user's set time zone.

Set XTM status to green/done

When TIPP has been activated in Configuration > Settings > System > General, a new field appears in the Workflow Editor window called Set XTM status to green/done. This allows you to set the status of segments in XTM depending on their status in an imported XLIFF:doc

To use this feature you set the XTM status value from the pull down menu and then when you import an XLIFF:doc into XTM any segments with a status greater than or equal to the set value, will be automatically given a green/done status in XTM.



Setting XTM status to green/done in the Workflow Editor.

Use the Populate linguist from template option to select a template to populate workflows steps with linguists only and decide whether to overwrite linguists that are already assigned.

Files that cannot be analysed

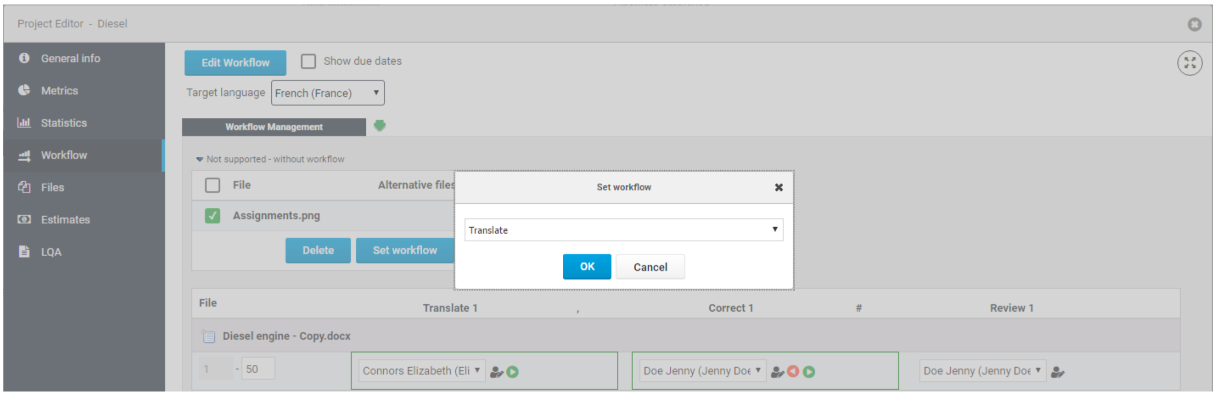
There are three reasons why a file cannot be processed in XTM

- The file is not supported by XTM. This means that there is not a suitable file filter to extract content. For example a .png file cannot be processed in XTM

- The file is empty. Files of this type have a suitable filter but do not contain any text for translation
- The file is invalid. These files cannot be processed by the file filter. This happens if the file extension has been changed or if they contain incorrectly formed XML

In these cases, if the option has been switched on in Configuration > Settings > Workflow > Workflow Options, the file is displayed as shown below which allows the project manager to set and manage a workflow for this type of file.

Non-analysable files in the workflow



Setting the workflow for Non-analysable files

When you allocate a linguist to a task for non-analysable file, the task will appear in their inbox, but when they click on it the only option will be to download the file and work off-line. XTM editor is not available.

Email notifications

XTM sends out emails when certain events happen in the system particularly in relation to project progress. Below is a list of the events and people to whom the emails are sent.

XTM emails

	ROLE OF RECIPIENT						
EVENT	All users	Project Manager	PM - Customers and Projects	PM - Create and view	Customer project manager	Linguist	Project watcher
New user created	✓						
New project created (analysis finished)		✓	✓ If creator	✓ If creator	✓		✓
New task allocated and started		✓				✓	✓
Task deactivated		✓				✓	✓
Task finished *		✓				✓	✓
Task declined *		✓					✓
Task declined when a user is deleted		✓					✓
Task re-opened		✓				✓	✓
Task reassigned						✓	✓
Task deleted						✓	✓
Password Reminder	✓						
Due dates		✓	✓	✓	✓	✓	✓
Group task allocated						✓	
Group task accepted		✓				✓	
Group task rejected after accepting		✓				✓	
Allocation order group task rejected by linguist		✓				✓ to next linguist	✓
Project finished to PM		✓					✓
Last linguist task changed		✓					✓
Project confirmed		✓	✓	✓			

Events marked with a * mean that the email is sent after an action by the linguist and are only sent for active tasks.

Emails are not sent to the person making the change thus if a project manager assigns a translator the PM will not receive an email about this.

If there is no PM allocated to the project emails will be sent to all PMs in the system.

XTM Xchange

	RECIPIENT		
EVENT	Company	Freelancer	
Registration	✓	✓	
Job published	✓	✓	Only if the “Send me emails about suitable jobs” is checked.
Job updated	✓	✓	
Added as a user	✓	✓	
Added as a subcontractor	✓		

XTM Subcontracting emails

	RECIPIENT
EVENT	Subcontractor Project Manager
Contractor assigns project to Subconctractor	✓
Contractor starts project	✓
Contractor updates project	✓
Contractor deletes project	✓

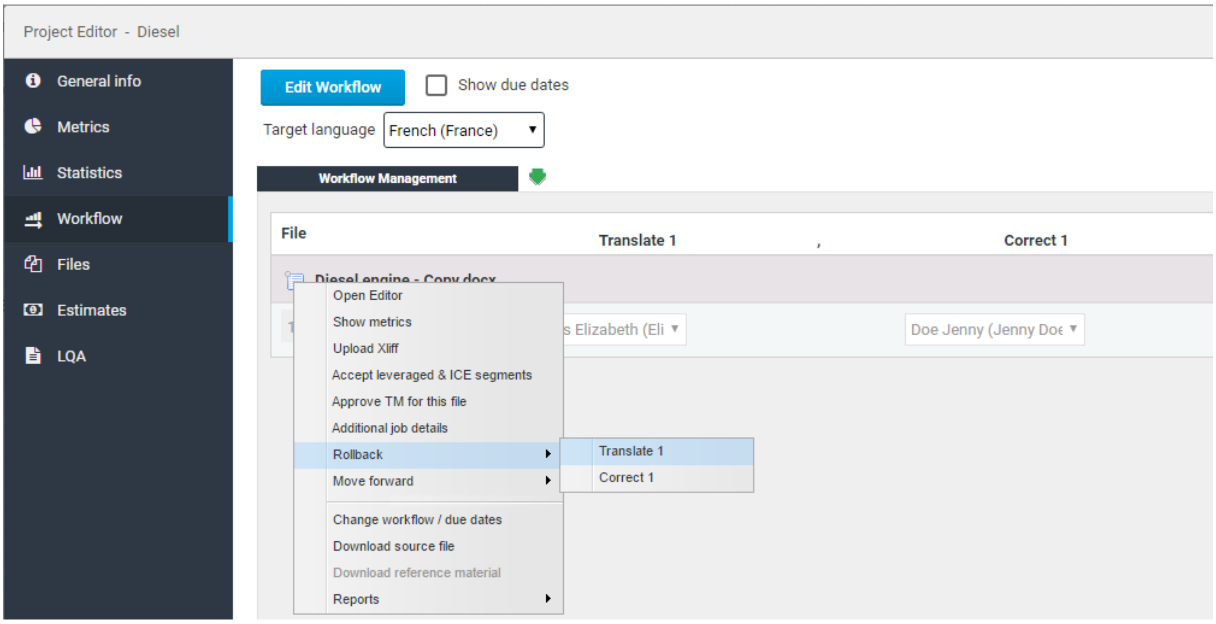
XTM Portal

Apart from the emails above XTM Portal also send out the following additional emails.

	RECIPIENT	
EVENT	LSP Project Manager	Customer project manager
Customer contact request	✓	
Customer project manager registered	✓	✓
Payment processed	✓	✓
Payment page accessed	✓	

Project Editor - Workflow context menu

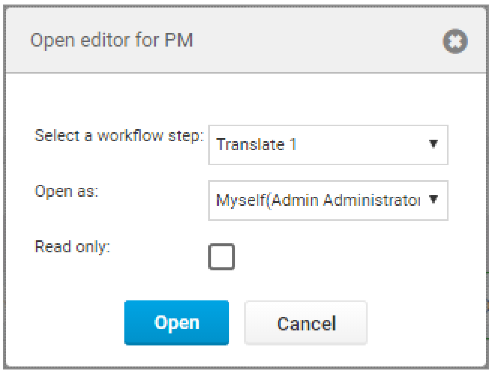
When you click on the icon by each file a menu appears allowing you to perform a number of actions.



Menu for each file in Workflow

Open Editor

By selecting the menu item you can view the job in XTM Editor. The first window that opens allows you to select which step in the work flow you want to open, who you want to open the editor as and whether or not you want it to be read only or with full access.



Opening XTM Editor from with Workflow.

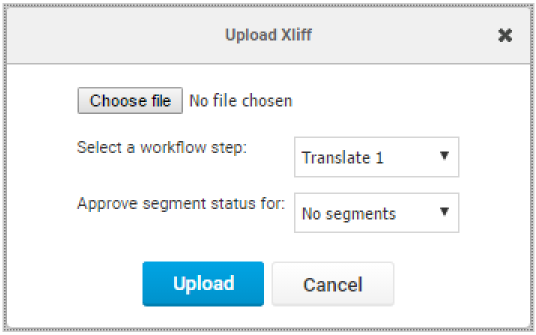
Show metrics

The menu item brings up the current metrics for the file allowing you to view the current progress of the file.

Upload Xliff

To upload an XLIFF file after off-line translation or review select the menu item "Update XLIFF". This brings up a window that allows you to select the file to upload. You can also specify which step in the workflow has been completed and whether you want to approve the segment status. There are 4 options for the approval:

1. No segments
2. Use the XLIFF segment status
3. Changed segments only
4. All segments



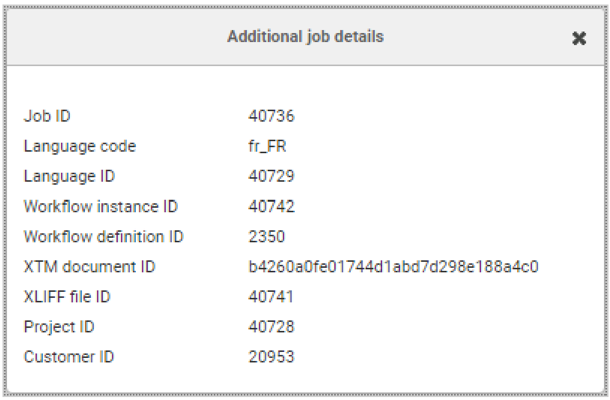
The XLIFF upload window

Approve leveraged segments & ICE segments
Selecting this option will change the status of all segments with 100% and ICE matches to done changing the colour from orange to green.

Approve TM for this file
Selecting this menu item approves all the translation memory for this file.

Additional job details

Opens a window with detailed project data, such as job ID, language code, project ID, customer ID and more.



The Additional job details window

Rollback

Sends a job back in the workflow to the selected step.

Move forward

Pushes a project forward in the workflow to the selected step.

Start main workflow

For projects with a pre-processing step this option starts the main workflow for a selected language or all languages, even when the pre-processing step is not finished. If the main workflow was started before finishing the pre-processing step, then the main workflow source text may change as the pre-processing step proceeds. TM matches are applied to the updated main workflow source text and include matches that come from translations provided for the earlier version of the main workflow source file.

Change workflow / due dates
Selecting this menu item brings up the window to edit the workflow and set due dates for the file.

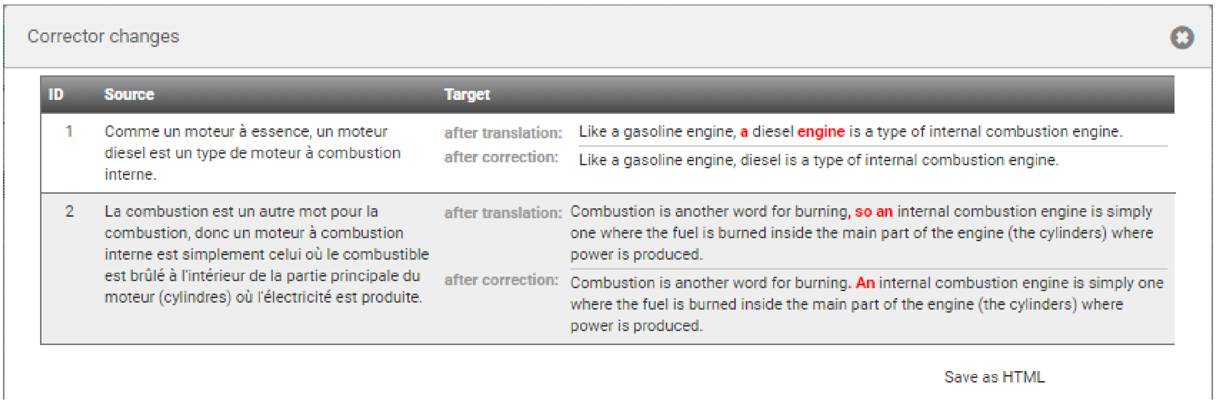
Download source file and reference material.

To download the source file or reference material for all the files in the project click the downward arrow. To download the source files or reference materials for one file select the relevant menu item.

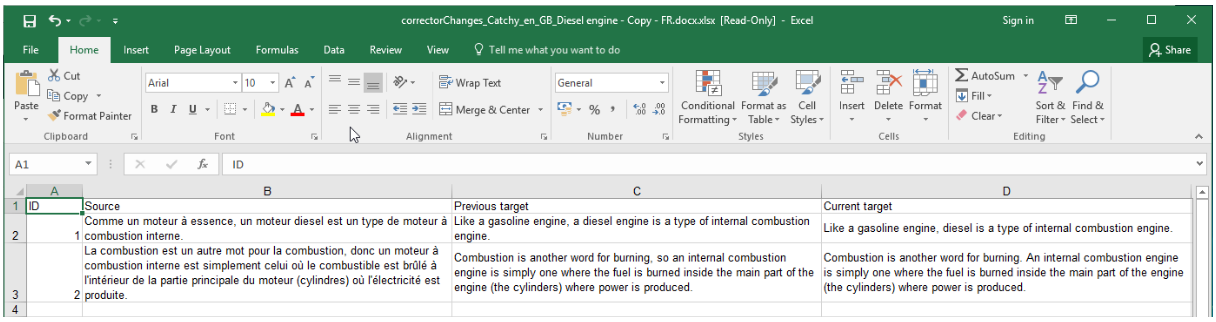
Reports

Selecting this menu item gives you five options:

1. View a report of the changes made by a corrector,
2. Download the report of corrector changes in an Excel file
3. Download a report of all the comments in the file,
4. View File history
5. View LQA report



Viewing the changes made by the Corrector



An Excel report of changes made by the Corrector

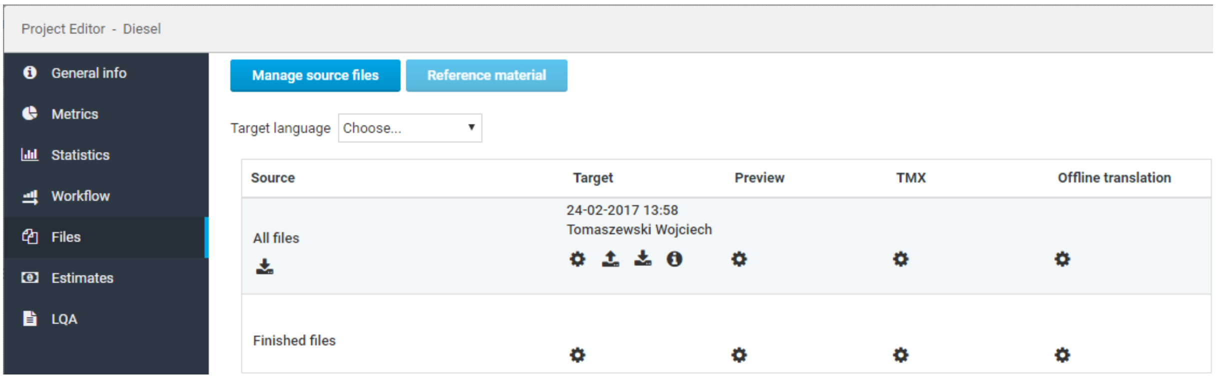
Reopen file

There can be three options available to reopen a file:

- Reopen — reopens the workflows and activates the final step in a workflow without pre-processing.
- Reopen and close main workflow — reopens the pre-processing step and closes the main workflow.
- Reopen and leave main workflow running — reopens the pre-processing step without making any changes to the main workflow.

Reopening workflows does not remove translations provided previously for the files in the workflow.

Project Editor - Files



The File Management Window - multiple target languages.

From this tab it is possible to generate and download any of the following files and for certain files upload them as well:

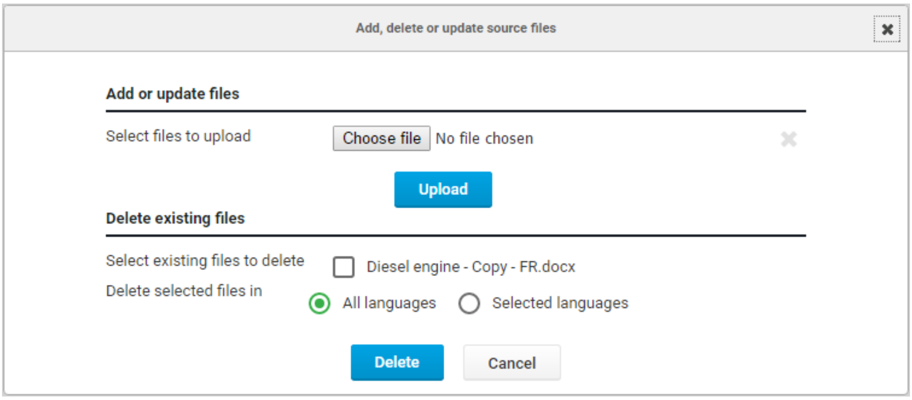
- Source
- Target. There are 5 options:
  - The target file as currently is. The target file is automatically generated at the end of the workflow.
  - The target file after a selected step in the work flow
  - A pseudo target file where all the text has been replaced by underscores. This allows you to quickly check that all the correct text has been extract for translation.
  - For each source file it is possible to generate the target file where the text has been colour coded according to
    - Match rate
    - Status
- PDF preview. Depending on your source file there are 4 options available:
  - A WYSIWYG view of the target file
  - A source / target table
  - A source / target table where all the text from the same paragraph are in the same cell
  - For HTML5 source files it is possible to generate a preview where the text has been colour coded according to
    - Match rate
    - Status
  - An extended source target table where you can select any of the following columns:
    - Segment number
    - Target text
    - Comments
    - Matches
    - QA warnings
    - Source text
    - XLIFF:doc status
    - XTM status
    - Revisions

    In this report you can choose if you want to
    - Display all languages
    - Include all project files in one report
    - Only show segments with QA warnings,
    - Populate target with source
    - Show user names
- HTML preview – there are 3 options available:
  - A WYSIWYG view of the target file
  - A source / target table

    - An extended source target table – similar to the above pdf version
- TMX file. The TMX file is based on the project XLIFF file and contains all the TM matches for the project and the translated segments.
- Files to perform translation or review offline and then upload the document after the work has been completed. The file types that can be downloaded are:
    - XLIFF
    - Multi-File XLIFF – Available when there are multiple source files. It creates one XLIFF file making the management off line translation easier.
    - TIPP package containing an XLIFF:doc file which can be opened up in compatible programs such as MemoQ, edited and then uploaded again to XTM. The definitions of TIPP and XLIFF are as follows:
        - TIPP package. - TIPP - The Translation Interoperability Protocol Package (TIPP) is an information container that allows the seamless exchange of information between different independent Translation Management Systems (TMS).
        - XLIFF:doc - A reference guide for representing documents in XLIFF files. The primary goal of XLIFF:doc is to provide a mechanism to allow lossless exchange of XLIFF data between tools in the localization workflow.
    - Excel file – Download this file to use the XTM Off Line Editor. See the chapter 6 “XTM Off Line Editor” for a detailed user guide.
    - PDF file for review in which you can add comments against each segment. The file can later be uploaded into XTM and the comments will be stored against as regular comments in XTM Editor.
- Unclean Doc containing both the source and target language. This is option is only available for MS Word source files.

Making changes to the source documents

To edit or update the source files in a project click the Manage source files button at the top of the page.



Adding or deleting source files in a project

When you add new files to a project, if you up load a file with a new name it will be added to the existing source files in a project. If however the file has the same name as one of the existing files in the project, you will be asked if you wish to update the source file. In this case XTM will keep all the segments that appear in both files, including any translations and all the information about the segments such as comments. Segments containing any new or changed text will be added to the project and if text has been deleted then the relevant the segments will be deleted. The workflow will be reset to the first step, but no changes to the resource allocation will be made. Snap shots of the Statistics and Metrics are created just before the project update and are available for download in Excel format by clicking on the History button on the Metrics and Statistics pages.

To delete a source file from a project click the check box beside the file and decide if you wish to delete the file in all languages or only selected languages, then click the delete button.

Generating and downloading files

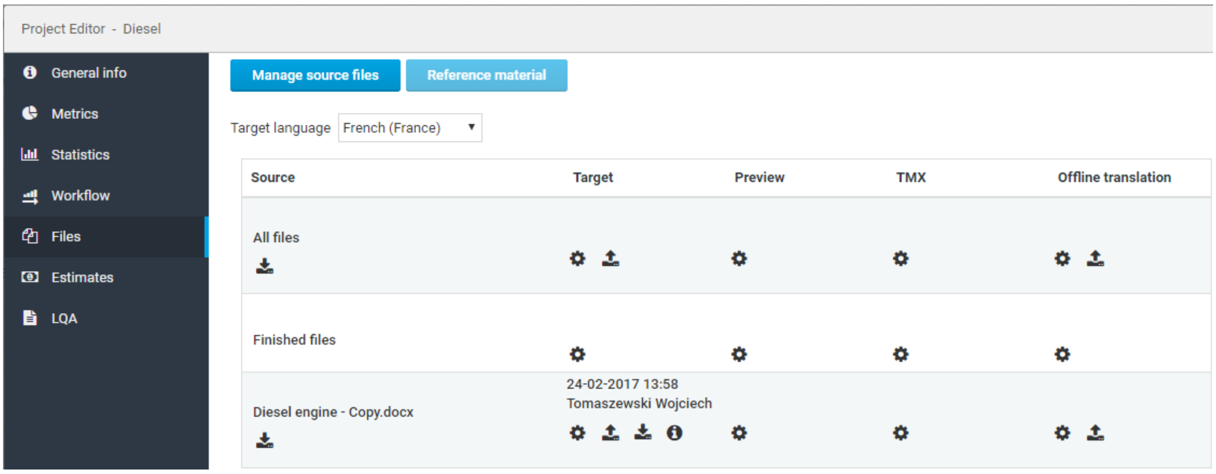
When all the steps in the workflow are complete the target file is automatically generated. However the files can be manually generated at any point during the process of translation.

Clicking on the icons in each cell has the following action:

Icon	Action
	Generates the latest version of the files at that time
	Downloads the file
	Displays the details and history of the generation of the files and allows you to download previous versions of the file.
	Uploads a file

In a project with multiple target languages when you initially click on the Files tab you have the option to generate and download all the files in the project or only the files that have been finished in the workflow.

To manage the files for a particular target language select that language from the pull down menu at the top. Again you are able to generate and download all the files or only the finished files but this time it is for the specified language only.



The File Management Window

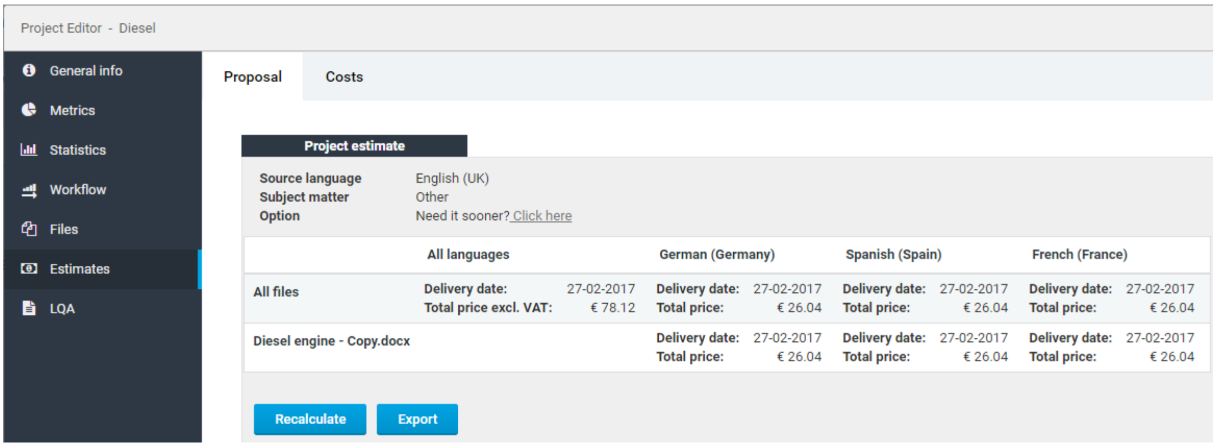
When you click on the generate icon the date and time of generation and the person who generated the file are displayed. If you click on the  icon a history of the generated files is displayed. To download a file click on the green arrow or to delete the history from the system click on the red cross. The details of the most recently generated file is visible in each cell.

To download the source file click on the green arrow by the source file name.

Project Editor - Estimates

There are two sections to the Estimates tab

1) Proposals – this is what you plan to charge your customer
2) Costs – this is what your suppliers, such as freelance translators will charge you.



The Estimates Window

Proposal overview

In this tab you can view and edit the customer estimate for the project. It shows the cost and duration of the project and hence the delivery date. The estimate is available for

- The entire project (All languages)
- Per target language
- Per file

Clicking on any of these cells in the project estimate will display the details of the estimate. You can view the details of the project, each language and each job.

Language estimate

Summary

	Base	Sum of job totals	Estimate	Final
Price [€]	163.20	159.94	159.94	159.94
Duration [days]	1.09	1.06	1.06	1.06
Delivery date	28-10-2016	28-10-2016	28-10-2016	28-10-2016

Minimum charge not used.

Discounts/Premiums

	Language combination	Metrics	Speed of delivery
Price [€]	0.00	-3.26	0.00
Duration [days]	0.00	-0.03	0.00

Average Factors

	Language combination	Metrics	Speed of delivery
Price [€]	1.00	0.98	1.00
Duration [days]	1.00	0.97	1.00

Base

Base cost per word [€]	0.10
Base words per day	1500
Speed of delivery	Normal
Calculation method	Addition
Work schedule	Monday to Friday
Minimum charge	50.00
Minimum text count	150.00
Auto quoting	Yes

Metrics

	Word count	Price factor	Price discount [€]	Duration factor	Duration discount [days]
Non translatable	0	0.10	0.00	0.10	0.00
ICE	0	0.00	0.00	0.10	0.00
Leveraged	0	0.30	0.00	0.30	0.00
DB Fuzzy Match (95%-99%)	0	0.70	0.00	0.50	0.00
DB Fuzzy Match (85%-94%)	0	0.80	0.00	0.70	0.00
DB Fuzzy Match (75%-84%)	0	0.90	0.00	0.90	0.00
Repetition	51	0.50	-2.55	0.20	-0.03
Fuzzy repeat (95%-99%)	0	0.70	0.00	0.50	0.00
Fuzzy repeat (85%-94%)	0	0.80	0.00	0.70	0.00
Fuzzy repeat (75%-84%)	0	0.90	0.00	0.90	0.00
MTs	0	0.00	0.00	0.00	0.00
No Match	1581	1.00	0.00	1.00	0.00
Total	1632	0.98	-3.26	0.97	-0.03

Save

A job estimate Window

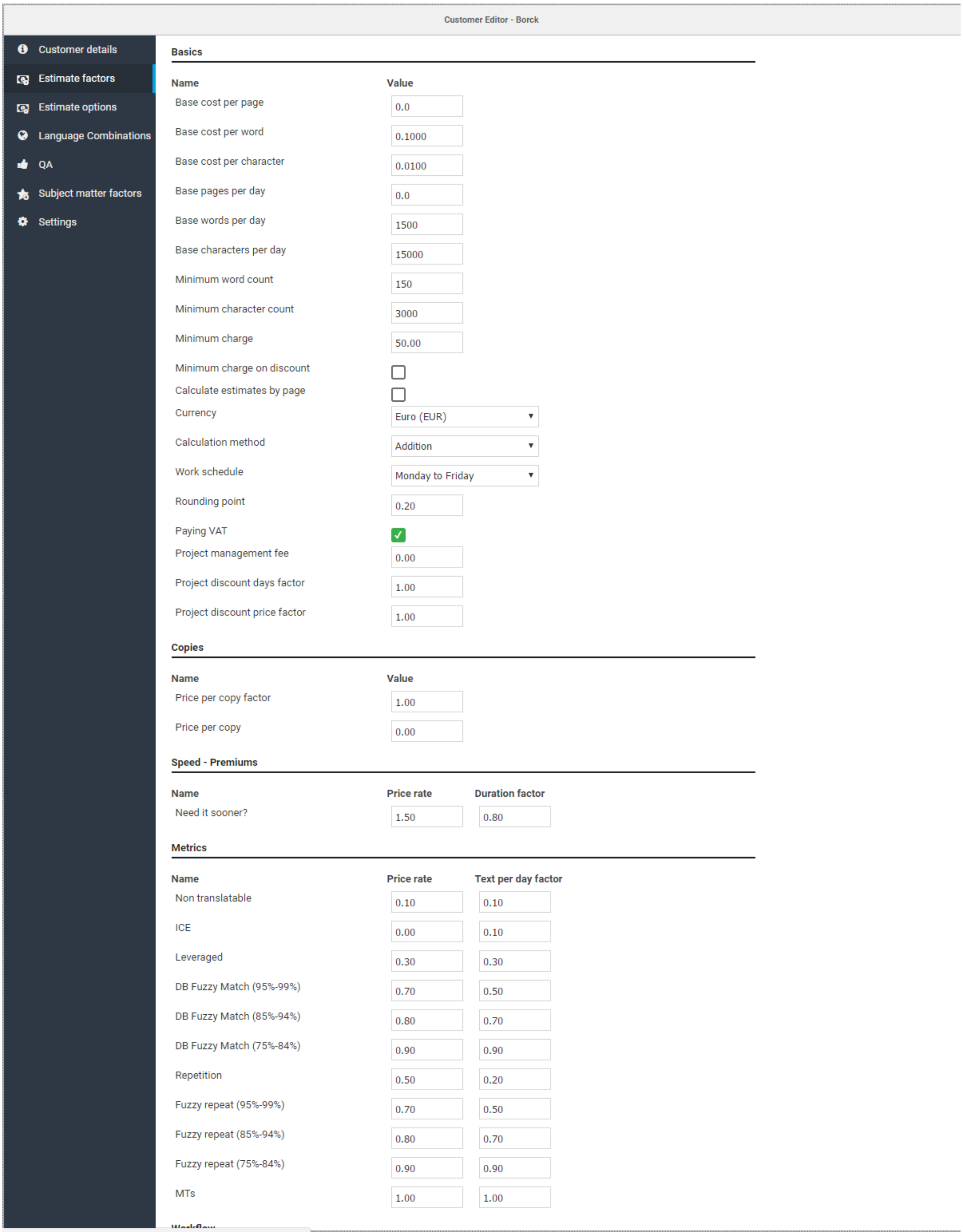
The estimate is calculated by XTM and then final values can be manually edited by the project manager.

Estimate parameters and factors

Initially a base cost and duration is calculated for the translation project and then a number of factors and parameters are applied to adjust this cost to give an exact estimate value. The parameters and factors that are used to calculate the cost and duration of the project are:

- Base cost per page, word or character
- Base number of words or characters per day
- Minimum word or character count for an estimate
- Minimum project charge
- Currency
- The calculation method
- Working schedule
- Whether or not VAT is applicable
- Duration rounding point
- Speed of delivery
- Metrics
- Language combination
- Price and duration factors for additional steps in the workflow
- Actual price or factors for document authentication

The estimate factors are given a default value when XTM is set up, but are configurable at a customer level



Setting estimate factors for customers

Language combination factors can also be set by the administrator on a system wide level.

If the factors are not set for a customer then XTM will use the system default values. Each factor has a value which will affect the estimate.

- The default value is 1 and this will not affect the estimate value.
- Values great than 1 mean that estimate value will be increased.

- Values less than 1 means that the estimate value will be decreased.

Minimum charges

You can set a minimum word count, character count and a total minimum charge for a job.

Work Schedule

There are three options Monday to Friday; Monday to Saturday; Every day.

Delivery speed factors

There are seven delivery types shown below. For each of them, price and duration factors are specified.

- Normal
- Make it cheaper - level 1
- Make it cheaper - level 2
- Make it cheaper - level 3
- Make it faster - level 1
- Make it faster - level 2
- Make it faster - level 3

The default value for Normal is 1. This is the value taken when initially estimating a project.

Users can choose the delivery type when preparing an estimate for the project.
Users may change the delivery type and language combination factors for each job or for the whole project. The estimate is recalculated each time a language combination factor or delivery type is changed.

There is also a simplified implementation of these factors where the user has reduced set of options. Firstly there is a "Need it sooner?” button which increases the price (Make it faster - level II). If this is selected then you have another button "Need it cheaper?” Clicking this will set it back to Normal.

Rounding point

The rounding point is the decimal part of a day at which the number of days is rounded up rather than down. For example if the rounding point is set to .2 then any duration with a fractional number of days great than .2 will be rounded up so that 2.1 is rounded down to 2 but 2.3 is rounded up to 3. This value can be set by the project manager and should be a decimal value less than 1.

Metrics factors

For each of the following types of matched segment there is a price and duration factor.

- Non translatable
- Exact Matches
- Leverage matches
- TM fuzzy matches for three categories (75%-84%, 85%-94%, 95%-99%)
- Repetitions
- In document fuzzy matches for three categories (75%-84%, 85%-94%, 95%-99%)

Using each factor and the text count, XTM calculates a global metrics factor according to the following formula.

Global metrics factor = Sum of (text type count/total text count * type factor).

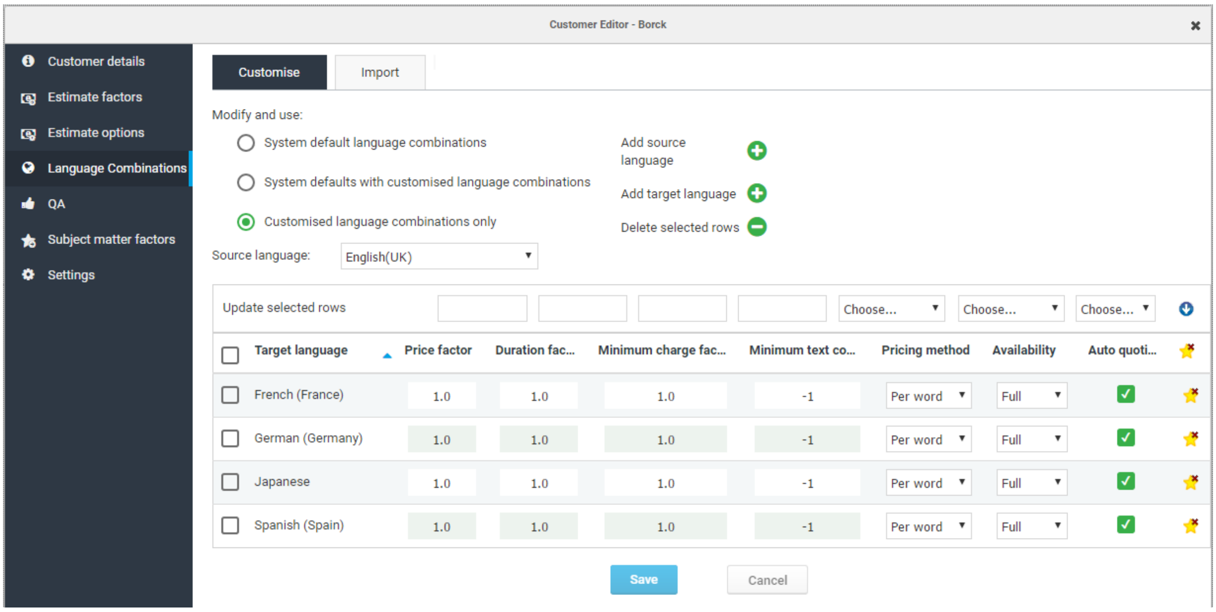
The following is an example of a metrics factor calculation.

Metrics	Word count	Price factor	Discounts price factors	Duration factor	Discounts duration factors
Total	1000	1	1	1	1
Non Trans	100	0.1	0.01	0.15	0.02
ICE	150	0.2	0.03	0.25	0.04
Leverage	50	0.3	0.02	0.35	0.02
Fuzzy 99%	5	0.8	0	0.9	0
Fuzzy 94%	10	0.85	0.01	0.85	0.01
Fuzzy 84%	15	0.9	0.01	0.9	0.01
Repetitions	200	0.3	0.06	0.5	0.1
In doc 99%	1	0.8	0	0.8	0
In doc 94%	2	0.85	0	0.85	0
In doc 84%	3	0.9	0	0.9	0
No matching	464	1	0.46	1	0.46
TOTALS			0.61		0.67

Global Metrics Price Factor = 0.61
Global Metrics Duration Factor = 0.67

Language combination factors

The administrator is able to customise the language combinations for the entire system and the PM for each customer. This defines which language pairs are available in the project creation window and also allows you to set the duration and price factors for each language pair. The customisation of language pairs is performed on the edit customer window and described in detail under Customer Editor section of this manual.



Setting language combination factors for customers

Estimate calculations

Base cost and duration calculation

Firstly XTM calculates a base cost and base duration for the project.

The base cost is calculated according to the formula:

Base cost = Total count of words or characters * Base cost per words or characters.

Base duration is calculated according to the formula:

Base duration =Total count of words or characters / Base words or character per day

Calculation method: Multiplication or Addition

Addition: All factors are added and then multiplied by the base cost according to the formula:

Final price = base cost * (1 + (language combination factor - 1) + (metrics factor - 1) + (delivery type factor - 1))

Multiplication: All factors are multiplied by the base cost according to the formula:

Final price = base cost * language combination factor * metrics factor * delivery type factor.

Job price duration and delivery date estimates

Job estimates are calculated after the job has been analysed and are based on all the factors previously described.

The estimated delivery date is calculated using the estimated duration time plus one day, the working schedule, and finally taking into account the configurable rounding point.

Initially the estimated price/duration and final price/duration equal to each other but the Project Manager can change the Final values after reviewing the estimate.

The Final Language combination delivery date and project delivery date are based on job estimates, so XTM stores the duration of each job. Since delivery dates cannot be summed up only the duration time (and not the delivery date) is modifiable at the job level.

Target language price duration and delivery date estimates

An estimate for each target language is calculated after all the jobs have been calculated, by summing the values for all the jobs in the target language.

Additionally the Minimum text (word/characters) factor is taken into account. If the sum of all jobs in current target language does not fulfil the minimum text count then the minimum charge is taken.

If the jobs fulfil the minimum text count then the parameter named "Minimum Charge On Discount" is checked. If the estimated price is lower than minimum charge, the minimum charge is taken as the estimated price.

After preparing the price as above, language combination level discounts are taken into consideration (as described in job level).

The calculated price is known as "Estimated price" and at this stage this is the final target language price. The estimated duration and delivery date is calculated in the same manner as for the Job duration and delivery date. Similar to the job calculation, only the duration time and not the delivery date is modifiable.

Project price, duration and delivery date estimates

The Project estimate is calculated by summing all the target language estimates.

Then the customer discounts are taken into consideration which may increase or decrease the estimates.

At the same time, project level discount rules are taken into consideration (as described in job part).

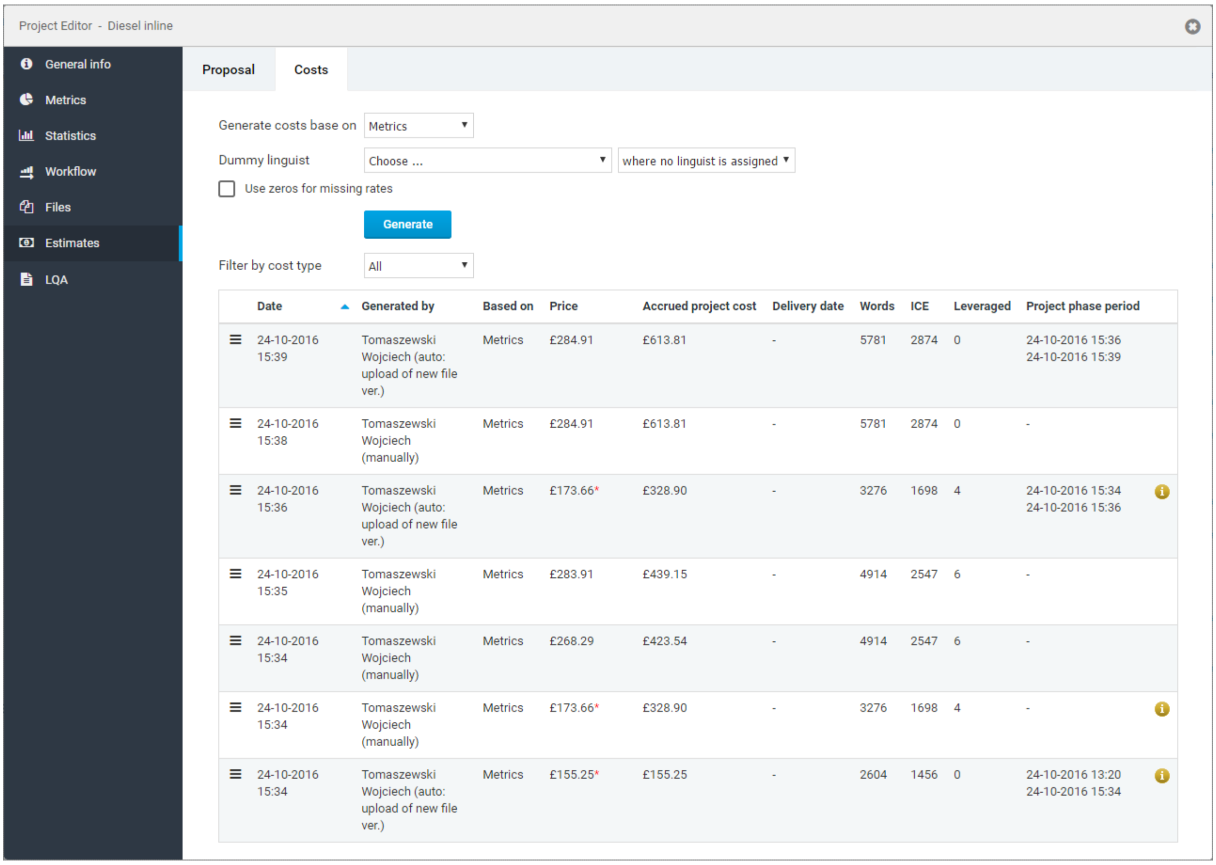
The calculated price is known as "Estimate" and at this stage is the same as the “Final” price which is modifiable by the Project Manager. The estimated duration and delivery is calculated in the same manner as the Job duration and delivery.

At this stage both the duration time and delivery date are modifiable.

The Project also has a Final Auto Price and Final Auto duration and delivery dates. However this feature must be switched on for each language combination.

Costs overview

The costs tab allows you to calculate your direct cost for translating the project. The figures are based on the rate cards of the linguists who have been assigned to tasks in the workflow. By selecting the relevant option from the pull down menu, you may choose to calculate based on the time, metrics or statistics of the source or target language. There are also options to replace missing rates with zeros or to choose a “dummy linguist” whose rate card settings would be used for cost estimation either for the entire workflow or only where no linguist is currently assigned. Each time the Generate button is clicked the costs are recalculated and stored as a separate line. Also, you can filter the costs by time, metrics or statistics of the source or target language.



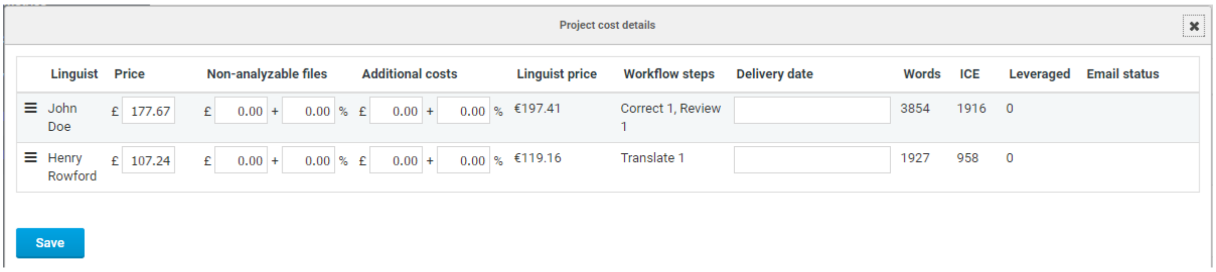
Project Editor – Estimates costs

When you are running a continuous project and have configured options for automation of continuous projects available on the Configuration tab > Data > Estimates > Cost settings you can notice that the Accrued project cost and Project phase period columns fill in with data during specific events such as reanalysis of the project or uploading new files with the same name as already existing in the project.

The important columns for continuous projects are:

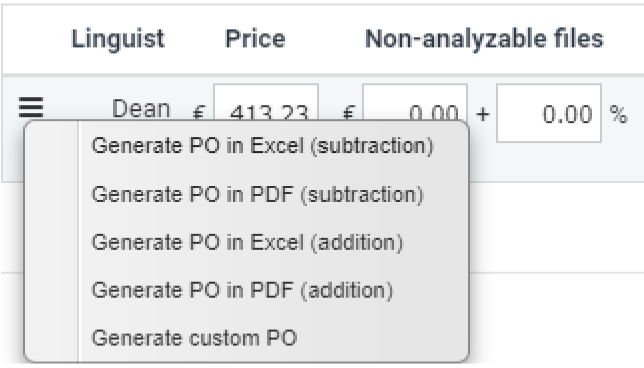
- The Price column indicates the individual cost of each estimate.
- The Project phase period column indicates the time range when a specific continuous project phase was in translation.
- The Accrued project cost column sums the previous costs that have an entry in the Project phase period column — it sums only costs of the completed project phases and any costs generated since completion of the latest phase.
- The Generated by column informs if costs have been generated manually or automatically and what event triggered them.

To view the details of the cost click on the line. The cost for each linguist is shown on a separate line. Both costs for non-analysable files and additional costs can be specified as either a fixed amount or as a percentage of the base price.



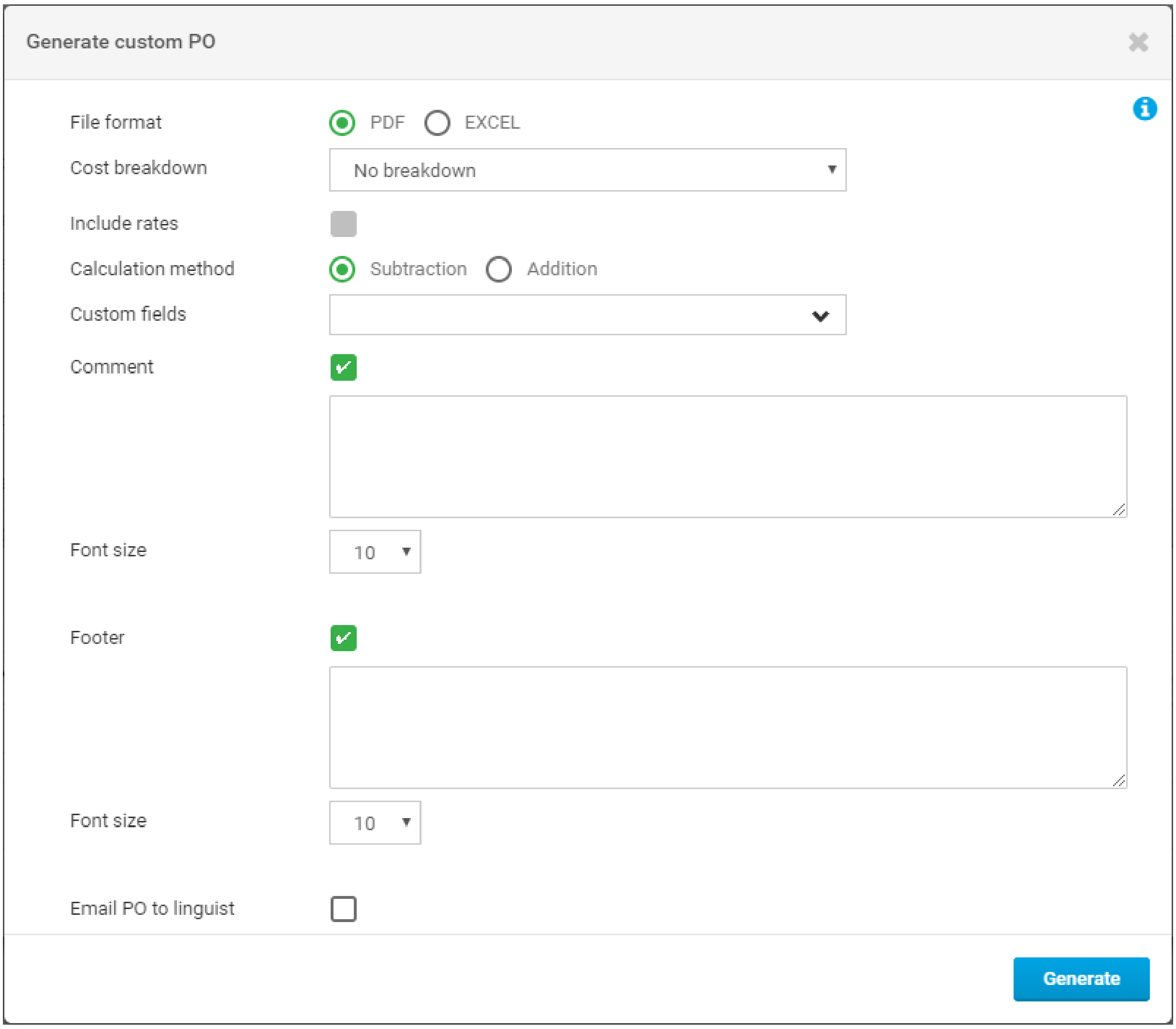
Project Editor – Estimates costs details

If the full cost cannot be calculated then the price will be shown with a red star and an alert icon will appear in the last column. Mouse over the icon to show a pop up message explaining why the full cost is not calculated.



Project Editor – Generating supplier POs

You can then generate a PO for each linguist. A pop-up will open where you can choose the PO file format, calculation method, and custom fields. You can decide to include rates or a cost breakdown into languages or languages and workflow steps. Also, you can specify whether the PO should be automatically emailed to the linguist, add a comment and customize the footer and font sizes.



Project Editor – Generating a custom PO

Time logging

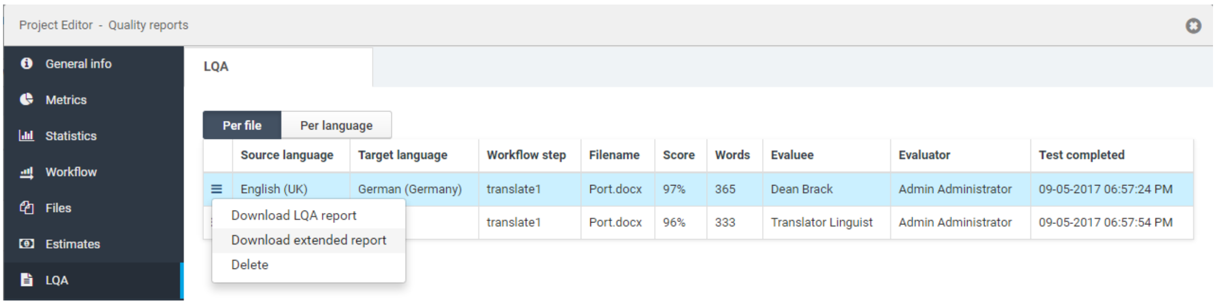
An administrator can configure XTM to log the time linguists take to perform a task automatically, or to allow you to enter the time manually. This is set on the Configuration>Settings>Projects tab.

If the time has been entered manually and there is a value for the rate per hour on the linguist’s rate card, it can be used to calculate the cost of performing the task.

Project Editor - LQA

LQA evaluations performed on a project are recorded on the LQA tab. The tab provides comprehensive data about the evaluation including language combinations, workflow steps, filenames, scores, numbers of words, linguists whose translation was evaluated, the evaluating linguists and dates.

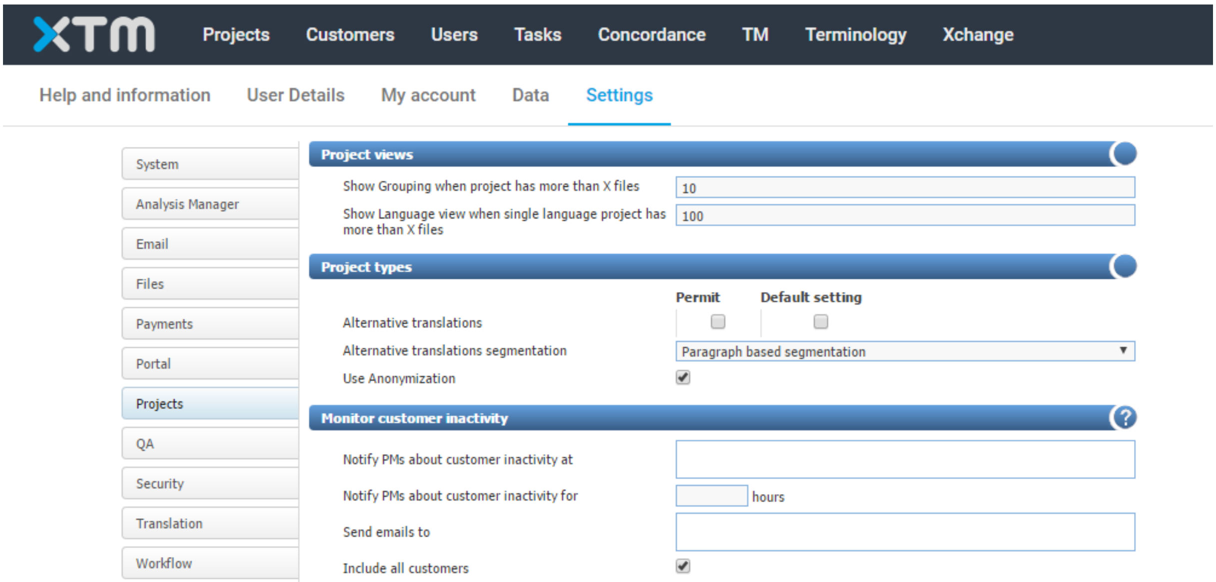
Project managers have an option to download the LQA reports and extended reports in an Excel file or remove an item from the list. In addition to the standard LQA report contents, the extended report includes the list of errors with their category and severity for each segment. The reports can be download per file or per language.



Project Editor – LQA

Project Editor - Groups

If projects have many files it is often easier to manage them in groups rather than individually. XTM has a feature that allows you to group the files together easily. When the number of files exceeds a defined limit then the grouping tab automatically appears. This limit is set by an administrator in Configuration -> Settings -> Projects

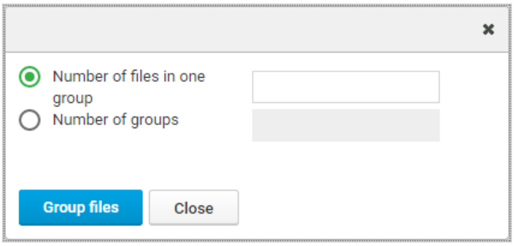


Setting the number of files in a project when Grouping and Language view are visible

Additionally if you have a single language project with many files you can also manage the project at a language level rather than at a file level. The number of files in a project when this is visible is set in a similar way.

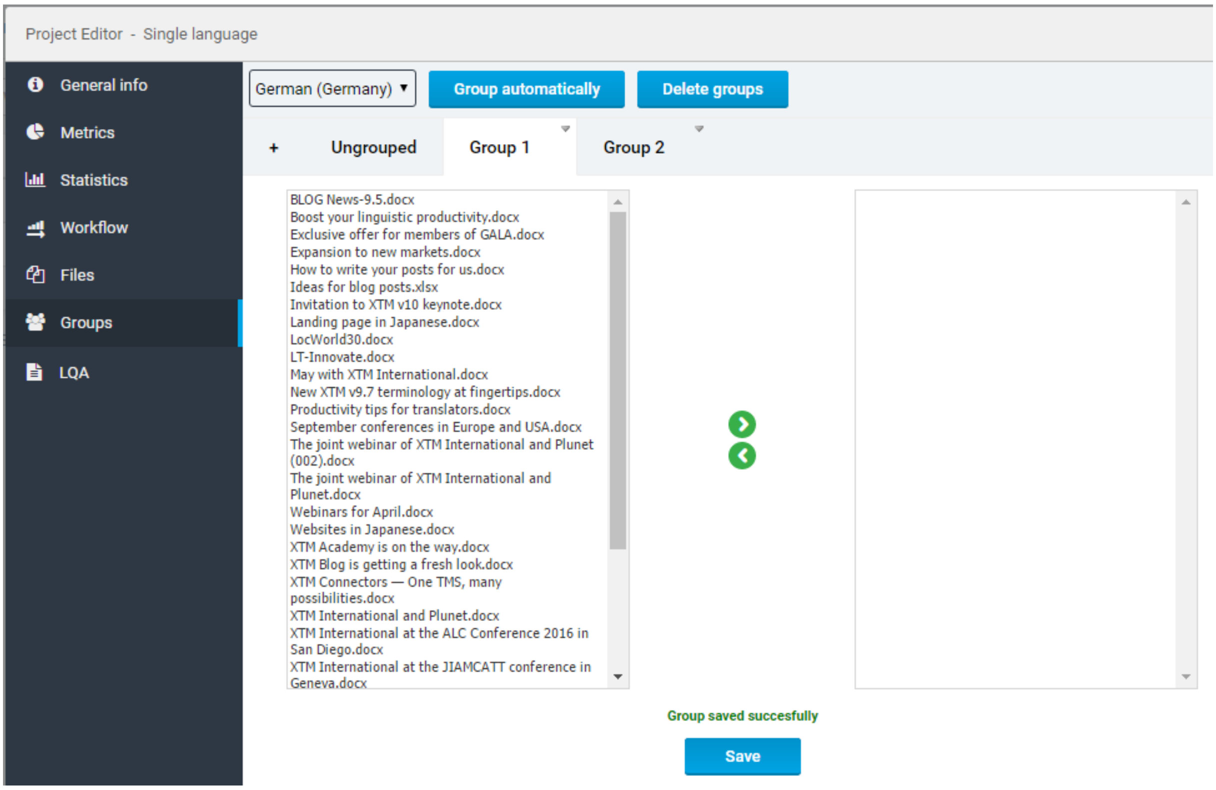
To create groups and allocate the files to a group click on the groups tab.

1) Either select a specific language from the “Choose the target language” menu or leave it as “All languages”.
2) To let XTM automatically group the file click the “group automatically button”
3) In the pop up window select whether you want to group by the number of files in a group or the number of groups, then enter the required value in the relevant box and click the “Group files” button.



Setting the automatic grouping

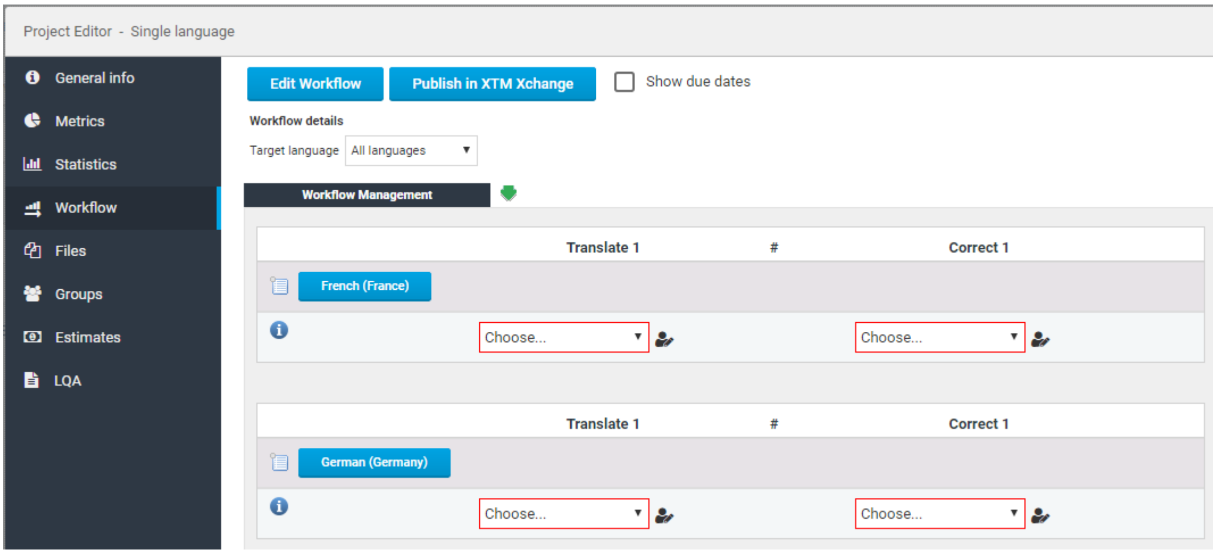
4) To manually create the groups I the lower section click on the plus tab. Then click on the tabs that appear and move the files from the left hand ungrouped files box to the right hand box. Click the Save button for each group before moving to the next.

5) 

Creating groups and allocating files to groups.

6) To delete a group click on the small triangle on the group tab and select delete from the pull down menu.

The advantage of the Group view and Language view is that in the Workflow tab it is easy to allocate translation resources to all the files in a group or a particular language rather than to all the files individually.



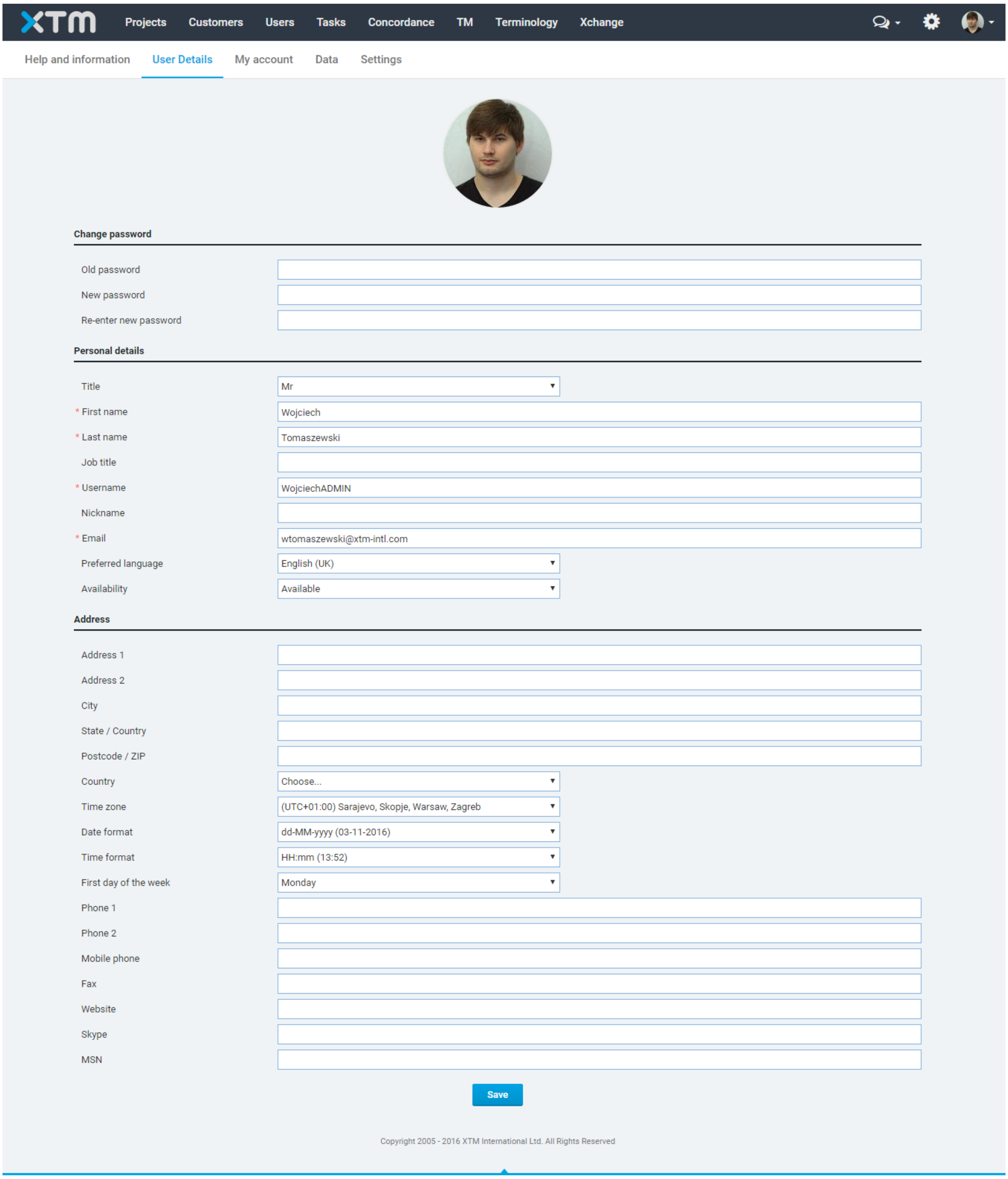
A project showing the workflow in language view.

A project showing the workflow in group view for a language

Configuration:

User Details

This tab allows you to change your password, your personal details including interface language and your address and contact details.



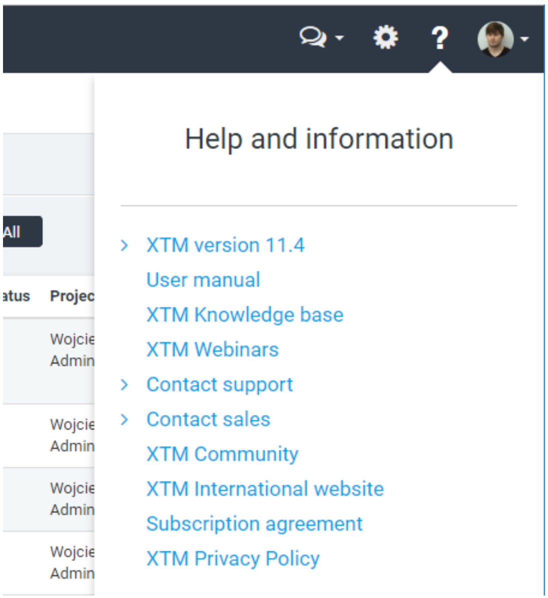
The User details window

5. XTM for Translators, Correctors and Reviewers

When a project manager assigns a job to you, XTM will send you an email to notify you of the task. Open the email and click on the link to open a browser and go to the XTM log on page. Enter your login name and password that was provided by your Project Manager. This will take you to the Tasks screen.

Help and information

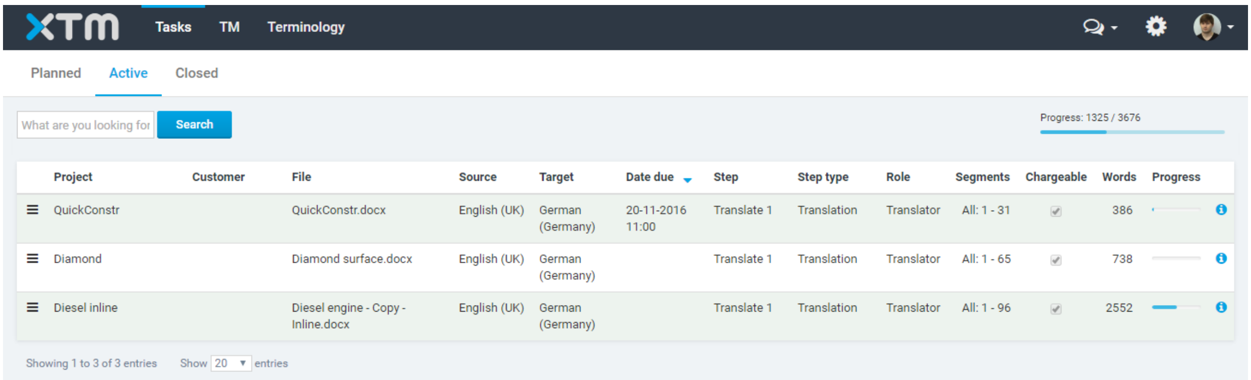
The question mark located between the configuration cog icon and your profile picture opens the Help and information side bar that provides quick access to help resources. It includes a link to XTM User manual, knowledge base How to… articles or XTM webinars. In addition, you can use XTM the Community to get help from your industry peers or contact sales or support. The subscription agreement and XTM Privacy Policy are as well available for reference in the side bar.



Help and information side bar

Tasks

All pending Translation, Correction, Review and LQA tasks are listed on the “Active” tab. Click on a task to open it in the XTM Editor.



The list of linguist tasks

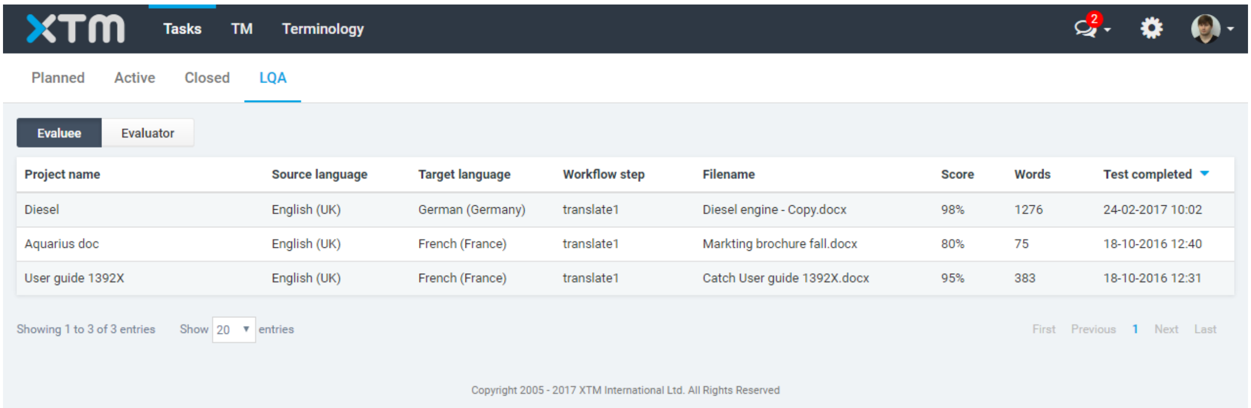
The search box above the task list can be used to find a specific project. Type the full or partial project name and click search.

At the foot of the table the number of tasks is displayed. You are able to set how many of them are visible and navigate to the next page if available.

LQA

There is an additional LQA tab which is displayed only when a Project Manager activates it for the user. The tab contains a list of projects in which the user was involved as an LQA evaluee and/or evaluator.

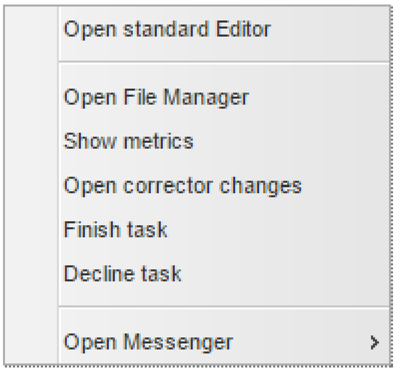
Depending on the granted access rights, both of the sections can be available, just one or none.



A list of LQA evaluated projects in which the linguist was involved

Tasks context menu

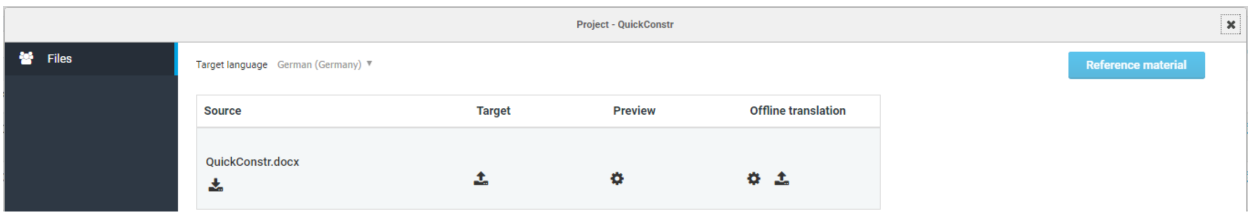
The ☰ icon at the side of each file brings up the following menu.



The task menu

This menu allows you to:

- Open standard Editor
- Open File Manager



The File Manager

Depending on your access rights it is possible to generate and download any of the following files and for certain files upload them as well:

- Source
- Target. There are 3 options:
  - The target file as currently is. The target file is automatically generated at the end of the workflow.
  - The target file after a selected step in the work flow
  - A pseudo target file where all the text has been replaced by underscores. This allows you to quickly check that all the correct text has been extract for translation.
- PDF preview. Depending on your source file there are 4 options available:
  - A WYSIWYG view of the target file
  - A source / target table
  - A source / target table where all the text from the same paragraph are in the same cell
  - An extended source target table where you can select any of the following columns:
    - Segment number
    - Target text
    - Comments
    - Matches
    - QA warnings
    - Source text
    - XLIFF:doc status
    - XTM status
    - Revisions

    In this report you can choose if you want to
    - Only show segments with QA warnings,
    - Populate target with source
    - Show user names
- HTML preview – there are 3 options available:
  - A WYSIWYG view of the target file
  - A source / target table
  - An extended source target table – similar to the above pdf version
- TMX file. The system administrator will have predetermined what TM that you are able to download. The options are
  - Translated segments plus all matches from the entire file
  - Translated segments assigned from the entire file
  - Translated segments plus all matches assigned to the user
  - Translated segments assigned to the user
  - Translated segments modified by the user only
- Files to perform translation or review offline and then upload the document after the work has been completed. The file types that can be downloaded are:
  - XLIFF
  - Multi-File XLIFF – Available when there are multiple source files. XTM creates one XLIFF file making the management off line translation easier.
  - TIPP package containing an XLIFF:doc file which can be opened up in compatible programs such as MemoQ, edited and then uploaded again to XTM.
  - Excel file – Download this file to use the XTM Off Line Editor. See the chapter 6 “XTM Off Line Editor” for a detailed user guide.
  - PDF file for review in which you can add comments against each segment. The file can later be uploaded into XTM and the comments will be stored against as regular comments in XTM Editor.

- Open Terminology - XTM Terminology opens in another window.

- Show Metrics which brings up the following window:

Metrics

Total count	31	386	100%	2,232	100%	1,869
Non-translatable	0	0	0%	0	0%	0
Translation memory matching						
ICE match	0	0	0%	0	0%	0
Leveraged match	0	0	0%	0	0%	0
95-99% Fuzzy match	0	0	0%	0	0%	0
85-94% Fuzzy match	0	0	0%	0	0%	0
75-84% Fuzzy match	0	0	0%	0	0%	0
Machine translation	0	0	0%	0	0%	0
Internal matching						
Repeat	0	0	0%	0	0%	0
95-99% Fuzzy repeat	0	0	0%	0	0%	0
85-94% Fuzzy repeat	0	0	0%	0	0%	0
75-84% Fuzzy repeat	0	0	0%	0	0%	0
No matching	31	386	100%	2,232	100%	1,869
Done	0	0	0%	0	0%	0
To be done	31	386	100%	2,232	100%	1,869
To be corrected	0	0	0%	0	0%	0
Total progress						

Save as XLSX Save as CSV

A typical metrics window

The metrics are updated in real time and so show the progress of the project. You can download the metrics as either a CSV file or as GMX/V

- Open corrector changes to show the report detailing the changes made by the corrector
- Finish task. This moves the job on to the next stage of the workflow after you have completed the translation.

- Finish the task

After completing the translation, correction or review, select “Finish task” from the menu.

This will have the following effects:

- The finished task will disappear from the “In-progress” list,

- The task will become visible in the “Closed tasks” list.
- The file will move to the next step in the workflow.
- An email will be sent to the PM advising of the change

Note that if a reviewer clicks finish task and the status of some units' is 'To be edited', the task will go back to the Translator.

- Decline task. This allows you to refuse the task allocated to you by the project manager
- Reject task. If you are a corrector or reviewer this option appears in the menu and allows you to send the task back to the previous person in the workflow.

XTM Messenger

XTM Messenger simplifies and accelerates the exchange of information between project members. Users can open chats with the project manager who created the project, with other linguists translating for the same language or with all linguists involved in the project when the option is enabled by the Project Manager.

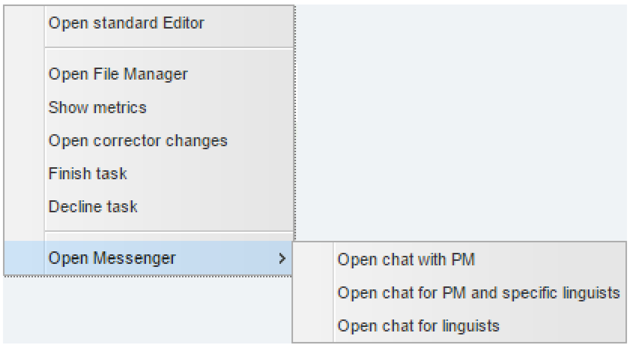
Nickname

You can set a nickname that will display above your messages sent in a chat, on the Configuration tab (the cog icon in the top right corner of the screen) on the User Details section. If you do not configure a nickname, your first name will be displayed in the chat window.

Opening a chat in XTM Messenger

The options to open chats are available in the context menu from the list of tasks. Linguists can choose from the options to:

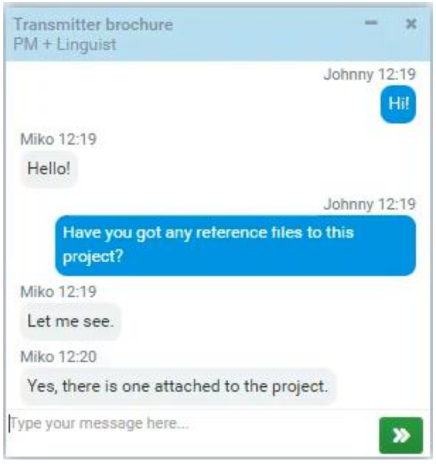
- Open chat with PM
- Open chat for PM and specific linguists
- Open chat for linguists (when enabled by the Project Manager)



Opening XTM Messenger by linguists

Chat window

When you open a new or an existing chat, a chat window will display allowing you to start a conversation with the person or people you want to communicate with. In the top bar of the chat window you can find the name of the project for which the chat is opened and who is involved in the conversation. Type your message in the text input field and click the green button or press Enter to send it.

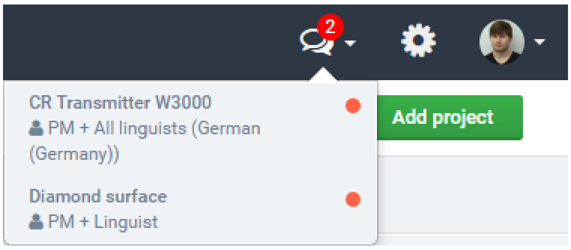


Chat window for a project

You can have multiple chat windows opened at the same time. If you open a new browser window with XTM, chat windows opened in the previous tabs or windows will become inactive. Chat windows will remain active in the latest opened window or tab.

Unread messages

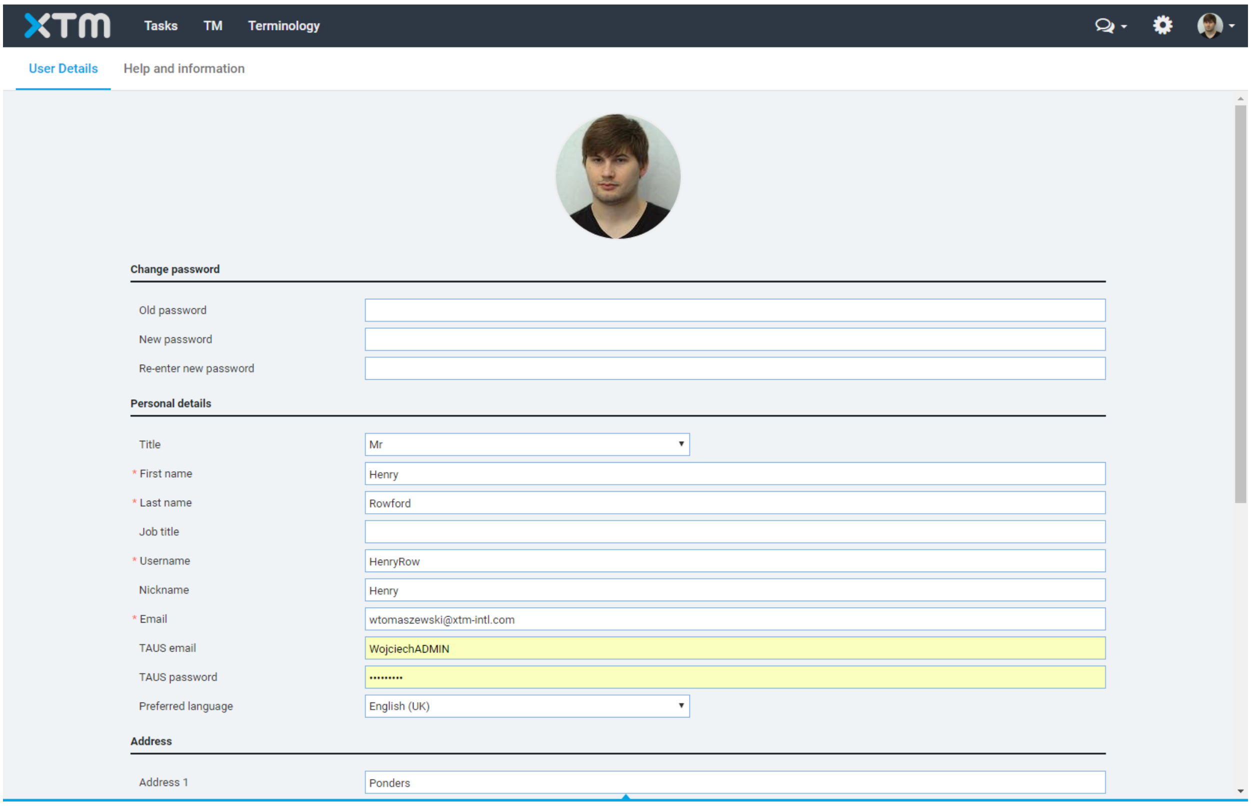
The XTM Messenger icon is located in the top right corner of the screen. You can use it to open existing chats. When you have unread messages, XTM Messenger will display the number of unread messages in a small red circle on the XTM Messenger icon. A red dot next to a chat indicates there are unread messages.



Unread messages in XTM Messenger chats

Configuration

Under the Configuration tab you are able to set your details. This includes your password, your personal details such as email address and preferred language and your postal address, telephone, time zone and other contact information.

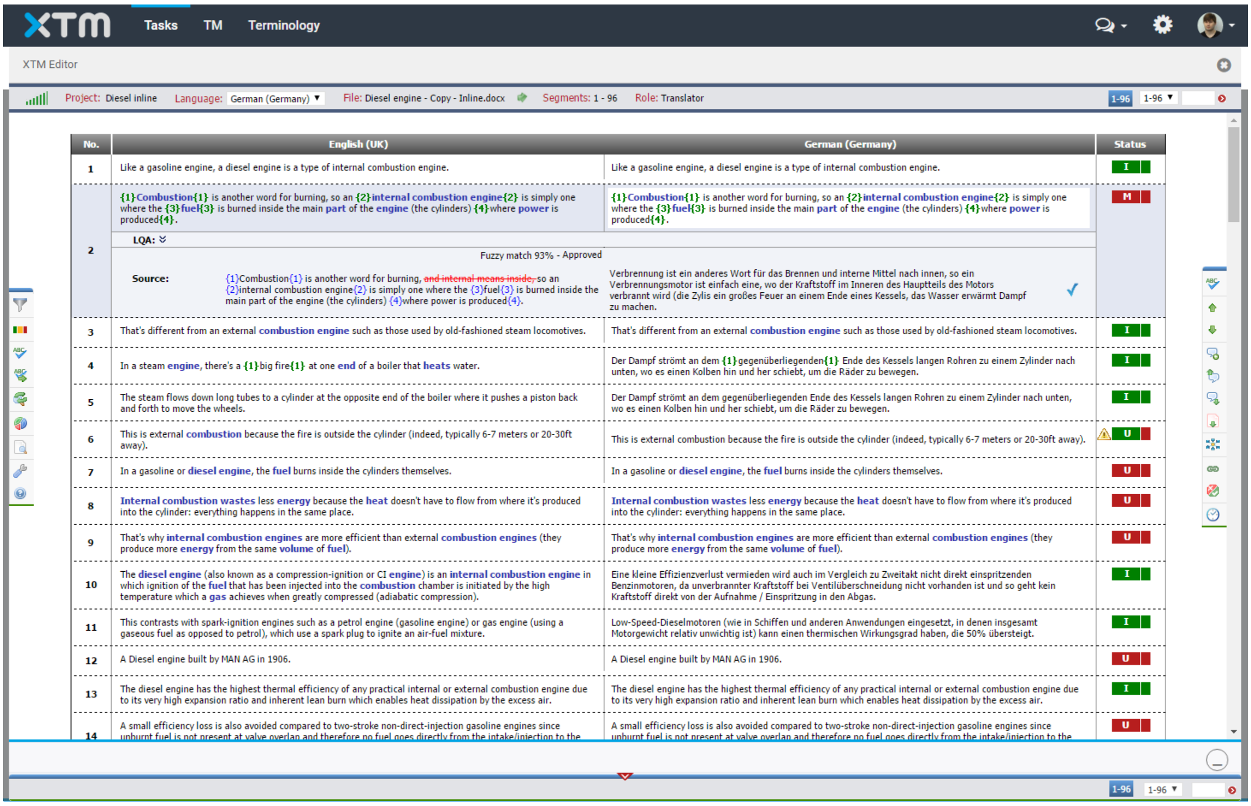


The User Details Window

XTM Workbench overview

In order to apply the translation memory, XTM segments the source document into sentences and phrases. The editor displays the document in four columns, which are from left to right:

1. Segment ID
2. The source language text
3. The target language text
4. Segment status



XTM web based translator interface

Translation Memory Matching

In the translation memory matching process XTM uses advanced text searching techniques based on the stem of the word. The matches are grouped in the metrics as follows:

Translation memory matching:	Internal matching:
In Context Exact Match	Repeat
Leveraged match	95-99% Fuzzy repeat
95-99% Fuzzy match	85-94% Fuzzy repeat
85-94% Fuzzy match	75-84% Fuzzy repeat
75-84% Fuzzy match	

In Context Exact (ICE) matches

An ICE or exact match is a 100% leveraged in-context match where the previous and next segments of the TM db are the same as previous and next segment in the document. The inlines in the TM segment must match the document segment inlines. If XTM has an In Context Exact match then the target language box is automatically populated with the translation and the status field set to green.

Exact matches are created only during analysis. A segment will not become an ICE match during translation even if an appropriate match is available.

100% leveraged matches

A 100% leveraged match is an exact match but in a different context. This means that the match needs to be reviewed by the translator. If XTM finds a 100% leveraged match for the source text in the TM, the target language box is automatically populated with the translation, but in this instance the status field is set to orange indicating that it needs to be checked.

Fuzzy matches

Fuzzy matches are displayed below the target language box, together with the match percentage. Also on the source side the text is displayed showing words that have been deleted from the fuzzy in red scored-out and words that have been added in blue. The status for fuzzy matches is set to red.

TM Propagation

If you translate a segment that is repeated later in the same document or in another document in the same project, XTM will automatically find the match in the TM according to your settings and insert the translation in the repeated segment.. If it is a fuzzy match this will also be offered to the translator. This feature works for multiple translators working on the same document.

Machine translation matches

If XTM has not found a match for the segment in a previous project, the current document or the translation memory, by default the source language text is shown in both columns. If you find it easier you may set the target language box to blank in these cases by going to the translation section of the configuration tab and unclicking the box “populate target with source”. If the Project manager has selected to use a machine translation, then a machine translation match denoted with an MT in the status column will be offered if available.

ID based matching

XTM can be configured to use ID based matching when the source files are XML, YAML, properties files or Microsoft Excel and iterations of the same file are processed. This type of matching is particularly useful for translating software interface text or games, where context is not particularly relevant. It will result in improved matching because matches that were a leveraged match can be shown as an exact ID match. In order to activate ID based matching in your instance of XTM please ask your administrator to contact support@xtm-intl.com.

Segment ID images

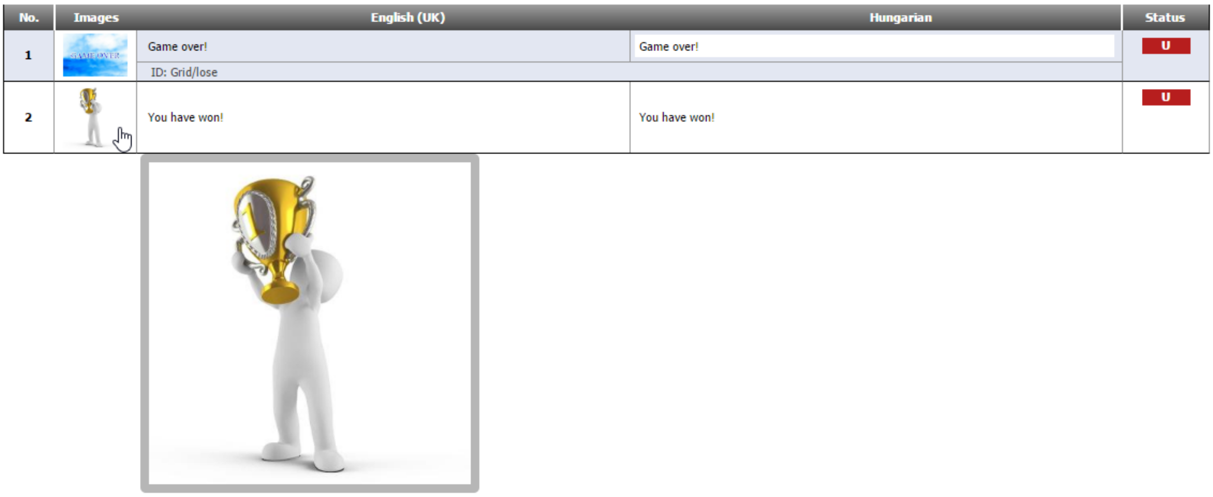
XTM can display images related to segments provided that image file names correspond to the key parameter value specified in the source files as the segment ID. The segment ID images can be any of the following image formats: PNG, JPG and GIF. The key parameter in the source file only accepts file names without their extensions, e.g.

Image file name: ImageName.JPG

Parameter: key=”ImageName”

Image files can be located in various directories inside of the uploaded zip package. Use slashes in the parameter keys of the source file to indicate parent-child directory relationship, e.g.:

key=”MainFolder/SubFolder/ImageName” to indicate that the image file is located in a specific subfolder inside of a different folder.



Segment ID images

When images are uploaded to segments thumbnails of these images are displayed between the segment numbers and the source text. You can mouse over a thumbnail to display it enlarged or click it to display it in a maximized view fit to the screen.

In order to activate Segment ID images in your instance of XTM please ask your administrator to contact support@xtm-intl.com.

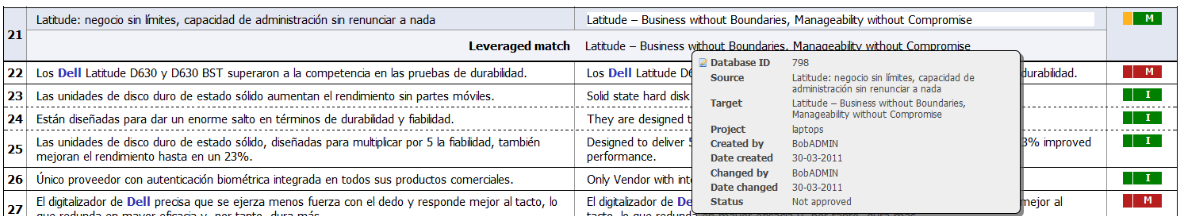
Displaying matches in XTM Editor

XTM Editor displays a maximum of 3 matches below each segment. They are ordered by the type of match and then by the date created or changed. The order is as follows: Exact match, Leverage match and Repetition, DB Fuzzy matches and Internal Fuzzy matches (in score order and then in date order), Google MT match.

If you click on a match in XTM Editor, the following details are displayed in a pop up.

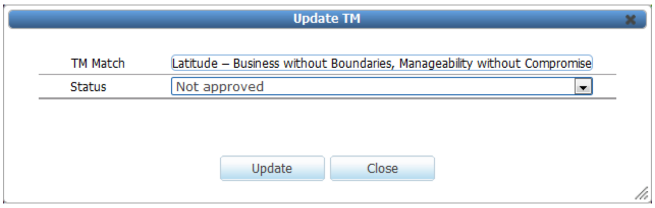
- ID
- Source
- Target
- Customer
- Project
- File
- Created by and date
- Changed by and date
- Status
- Context which shows the previous and next source segment, plus the previous and next target segment.

You can choose not to display the created by and modified by fields by switching this off in Configuration, Settings, Translation, privacy.



A pop up showing the details of a leveraged match

Clicking on the pencil icon to the left of the database ID brings up a window to edit the translation memory. You can also set the status of the TM segment and delete the segment from the TM.



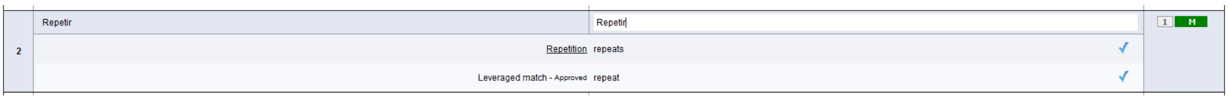
Update TM window

Storing TM

Any new TM created during translation is automatically stored in the database on the server when leaving the segment. It is saved with the source and target segments, metadata and also the stemmed formed of the words. The text and stems are indexed using Lucene and is then used for fuzzy matching, concordance searches and searches in TM Manager.

Repetitions

As you work through the document, XTM continually checks the TM database on the server and updates the matches displayed in XTM Editor. This is particularly important for repeated segments. In these cases XTM identifies repetitions during project creation, then when you translate the first instance of the repetition this translation will be propagated throughout the document to all repetitions as the appear on a page.



A repeated segment

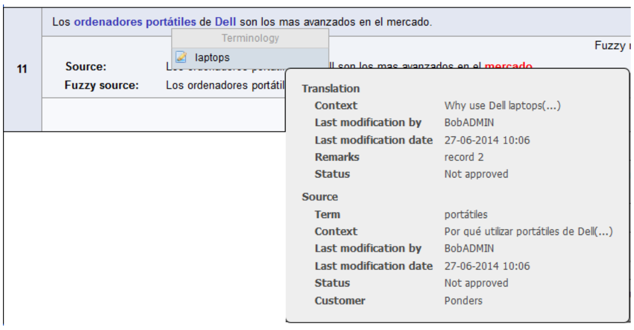
Clicking on the link Repetition automatically applies the repetition filter and displays all the repeated segments in the document.

The  icon appears when you apply the filter “Repetitions”. If you make a change to one of the repetitions click on it to propagate a change to the other repetitions.

If the translation of a repetition is updated, the update is automatically propagated only if the source text equals the target text. Otherwise as you are working through the document if a match is found that is newer than the one used initially, then the newer match will be displayed to you and highlighted with an orange border.

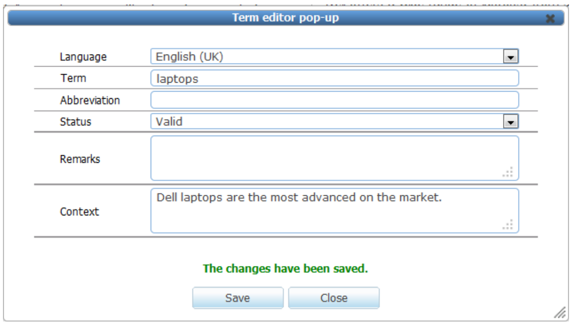
Terms

Existing terms appear in blue in the source text. Clicking on a blue word shows the approved translation for the target language. Mouse over the translation of a term to display a tooltip with its details.



A highlighted term with translation

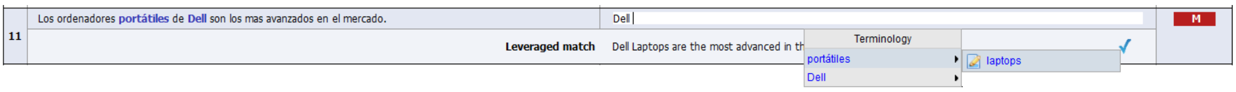
Clicking on the pencil icon to the left of the target term brings up a window to edit the term details



The term editor

In order to insert a term in the target segment there are two options:

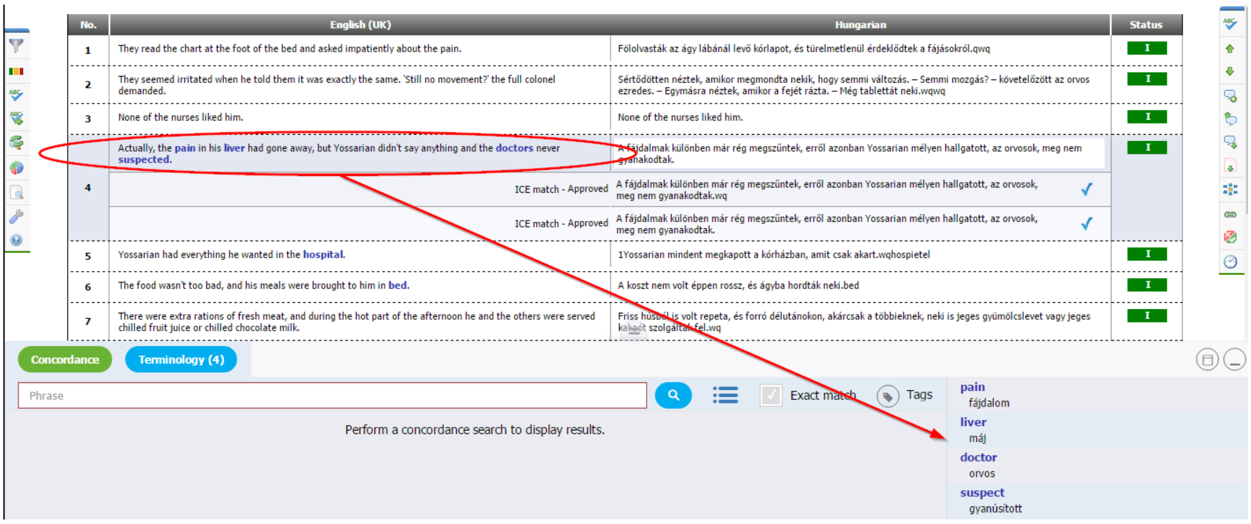
1) If the source text is populating the target segment, the terms will be present and highlighted in blue. You can then click on the blue term and select the translation for that term from the pop up menu. The default keyboard short cut to bring up this menu is Control+shift+T but this can be changed in XTM Editor > Settings > Shortcuts > Insert term.
2) If the source language terms are not present in the target segment, you can still use the keyboard shortcut and a list of all the terms in the segment will appear. You can use the keyboard arrows to navigate to highlight the correct term and then press Enter to insert the term.



Inserting a term in the target segment

Terminology recognition

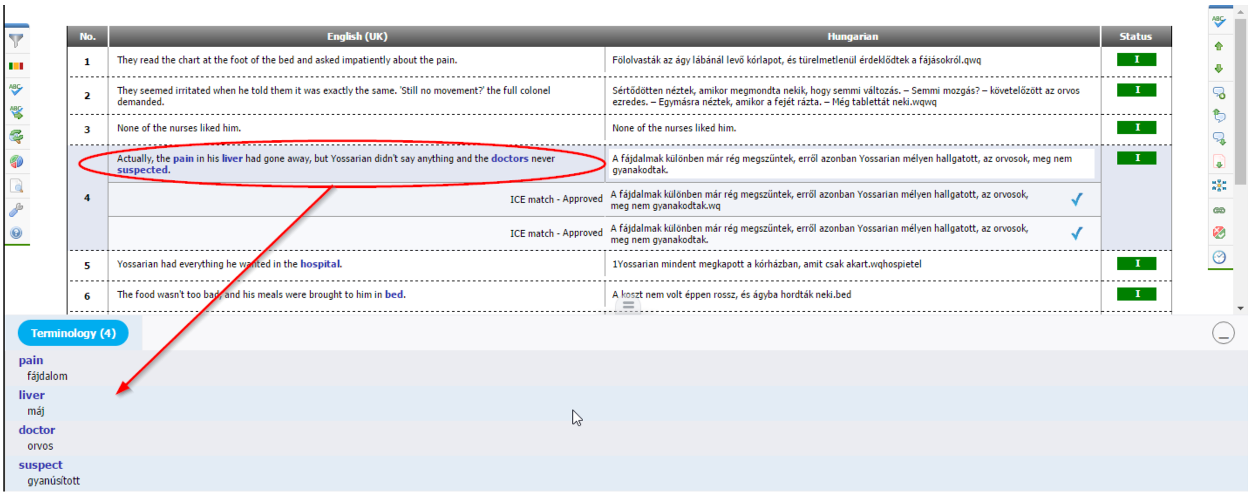
XTM Editor can display all source terms recognized in an active segment together with their translations for the target language. Click the icon in the right bottom corner of the screen to open the terminology recognition window. You can also see the concordance search and results area depending on your configuration of the concordance feature. The number in the blue Terminology button indicates the number of terms recognized in an active segment.



Terminology recognition window with docked concordance

It is possible to increase or decrease the size of the terminology recognition window. Drag the vertical line between concordance and terminology sections to the left or right to adjust the space for terminology to your needs.

If you use concordance in the pop-up window, you will only have terminology recognition available at the foot of XTM Editor.

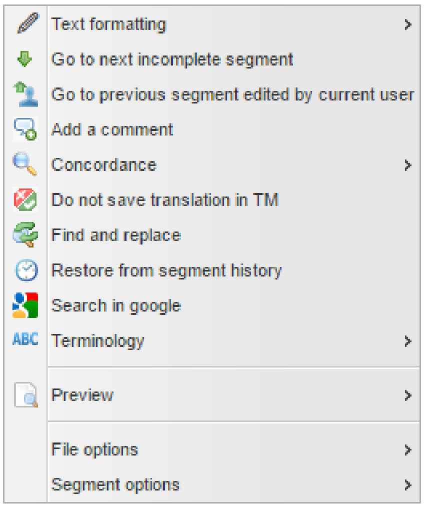


Terminology recognition window when concordance set to popup

Context sensitive menu for text

When you right-click on the source or target text, a context sensitive menu appears giving you the functionality that is available in the left and right hand menus and some extra items: Concordance, Search in Google and Terminology.

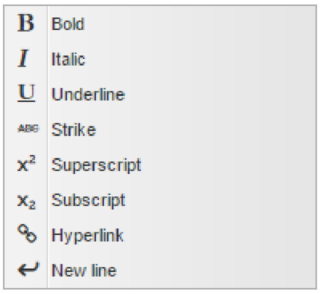
Terminology: Note that this menu item only appears if you have been given terminology rights on your account.



Context menu for text

Text formatting

This item is available in the context menu only when the text formatting feature is enabled for the project.



The menu for additional text formatting

Go to next incomplete segment

This option activates the next red or orange segment for editing. The option is available from this context menu and as a keyboard shortcut.

Go to previous segment edited by current user

This option activates the segment that was previously edited by the user who opened XTM Editor with this bundle. If the last segment was a repeat, XTM will activate the last repetition. The option is available from this context menu and as a keyboard shortcut.

Add a comment

This option opens the Add comment popup. Comments can also be added by clicking the  icon on the right-hand side toolbar.

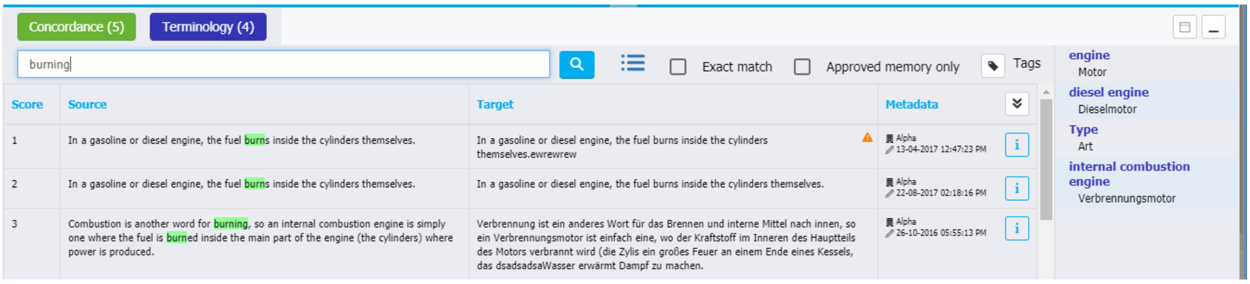
Concordance

Before selecting this item from the context menu, highlight a word in either the source or target text. You can also use your predefined shortcut to run a concordance search. Concordance searching will be performed either in the source or target text depending on where the word was highlighted.

Concordance opens in a pop-up window, a new window or a panel docked at the bottom of the screen that displays the latest source and target language phrases in the translation memory along with the modification date and customer name. When opened in the docked panel, concordance opens with terminology recognition window to the right. You can drag the vertical line between concordance and terminology sections to adjust the space to your needs. Mouse over the symbol to view additional metadata for the segment.

There are two options available in the concordance context menu:

Default – results are based on the linguistic stem of the chosen word and will match other forms of the word. This allows translators to see how the word was translated previously. The various segments are shown in order of relevance.



A typical concordance window

Exact match – If you are only interested in one form of the word then use the Exact match option.

Approved memory only – If you only want to see results from the TM with an approved status, select Approved memory only.

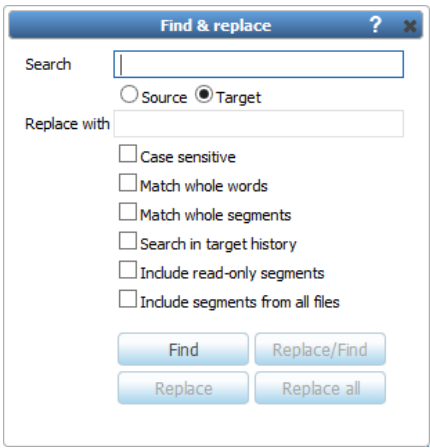
The downward arrow button in the Metadata column provides options to sort by: score, customer, project, create date, modification date, file name or segment ID. When used, the results are first sorted by the selected criterion and secondly by the score.

Do not save translation in TM

Use this option not to save a translation of the segment in a translation memory. The same option is available under the icon on the right-hand side.

Find and Replace

The find and replace window shown below can be displayed by selecting it from the context menu or by clicking on the icon in the left hand tool bar or using the keyboard shortcut – default value Alt+f.



The find & replace window

You can search for the word in either the source or target text, however you can only find the word in the source text and not replace it, so in this case the replace buttons are greyed out. If you have segment ID based matching switched on then there is another option to allow you to search by Segment ID.

There are a number of search options to check to find segments where:

- The text is the same case
- The whole word is matched and not part of it
- The whole segment is the same
- The segment history in included in the search
- Read only segments are included in the search
- All files in the project are included in the search

If you did not previously highlight the search word in XTM Editor, type it in the search box. Then type in the replacement word. Click the Find button. When the word is found the “Replace” and “Replace/Find” buttons become active. Next either click the “Replace” button to just replace this word, “Replace/Find” to replace the word and find the next or “Find” to leave this word unchanged and go to the next instance.

“Replace all” replaces all the words in the document or project. It is important to note that while a replace all action is taking place all the segments in the document will be locked and XTM Editor the segments will appear to be greyed-out. Depending on the size of the documents replace all can take several minutes.

Restore from segment history

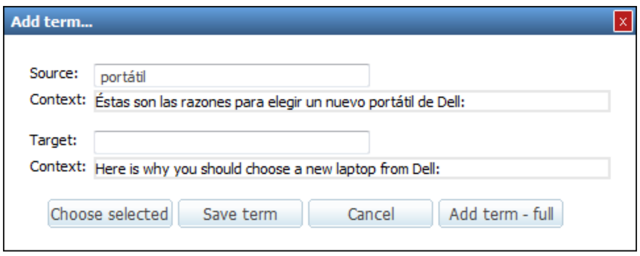
Use this option to return to an older version of translation of the segment. It is the same option as the one available under the icon on the right-hand side toolbar.

Search in Google

Before selecting this menu item, highlight a word in either the source or target text. A new window appears with the results of a Google search on the highlighted word.

Terminology

There are three options**:**
Add Term – Quick: To add a term to the terminology database while working within XTM Editor, highlight the word, then right-click it and choose “Terminology> Add term – quick”. The window below appears.



Adding a term from the Editor

To enter a translation for the term, either type the translation in the target field, or highlight the translated term in the target segment supplied and click “Choose selected”. Click “Save term”.

Add Term – Full: To open the full terminology window directly, select “Terminology > Add term – Full” from the context menu for text. This enables you to enter data in all the fields for a term.

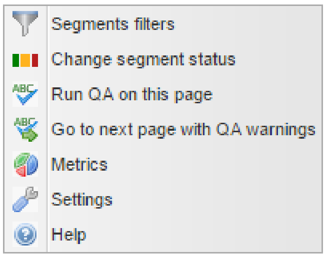
Open Terminology: If you want to browse the full list of terms for this customer select the option "Terminology > Open terminology".

Preview

This option provides quick access to generate previews of the file opened in XTM. It is the same option as the one available under the icon on the left-hand side toolbar.

File options

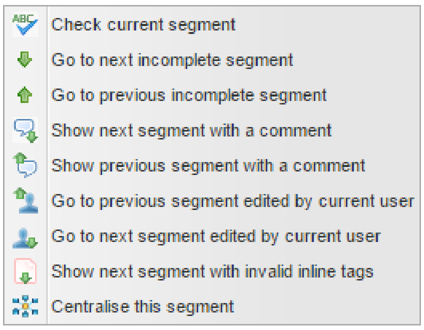
File options provide a quick access to the features available in the left-hand side toolbar.



File options from the context menu for text

Segment options

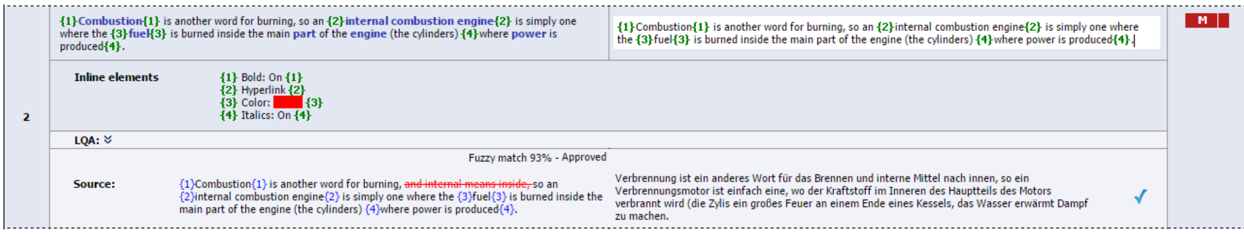
Segment options provide a quick access to features related to navigation between segments and actions performed on specific segments.



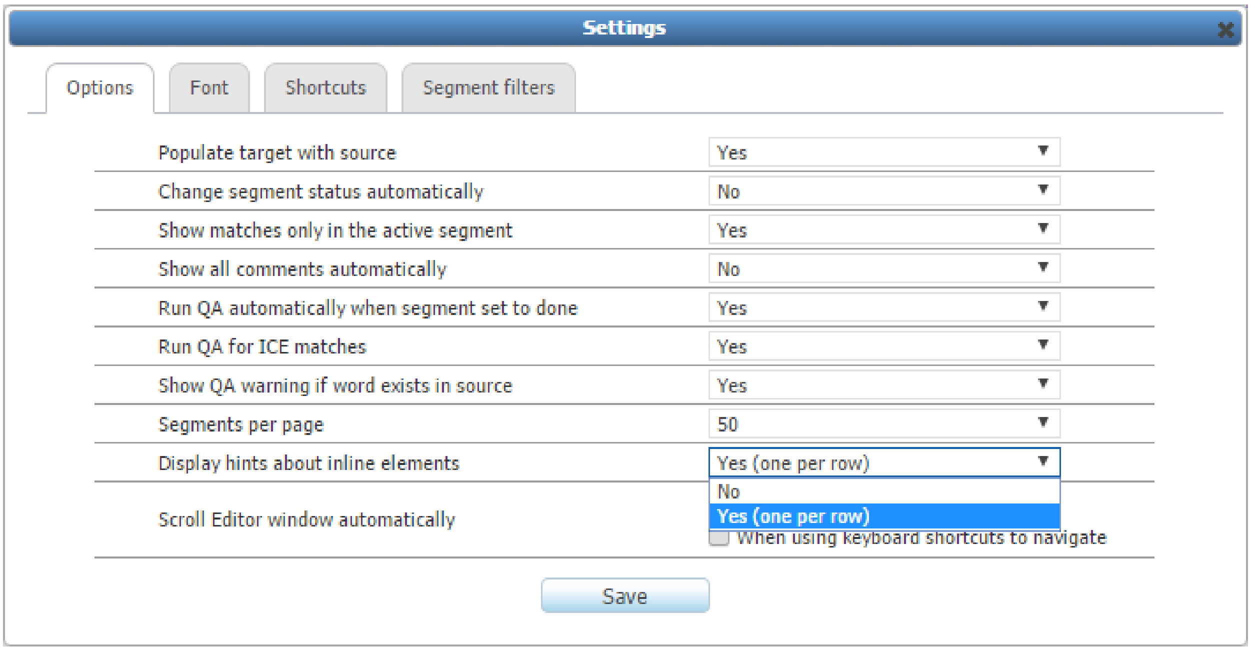
Segment options from the context menu for text

Inline elements

Inline elements, or tags, such as text formatting, are represented in the text for translation by numbers in curly brackets e.g. **{1}**. For in line elements with content, the numbers in brackets come in pairs around the text and are green. When the source document is Microsoft Word, and the option to display hints about inline elements is enabled, XTM Editor shows the meaning of inline elements underneath the segment.



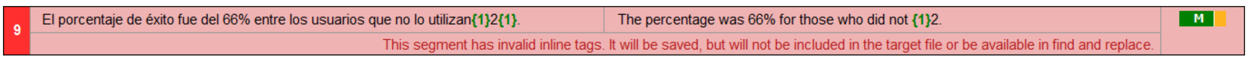
A segment with inline elements and their explanation underneath



The option to display hints about inline elements underneath the segment

Those inline elements without content appear alone and are blue.

It is important that there is the same number of inline tags in the target segment as in the source segment. To insert an inline element in the target segment put the cursor in the desired location and type Alt + number on your keyboard. If you are missing any inline elements the segment will be highlighted in red and a message will appear at the bottom of the page and in the segment. If you do not correct this the segment will be saved but the translation will not be used when the target document is generated or available in find and replace.

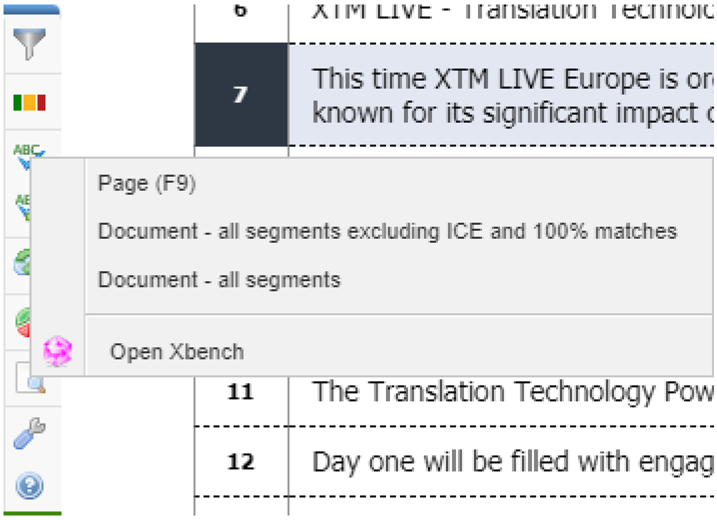


Segment with missing inline tag

Also if you have red segments on the page, as you move to the next page there will be a pop up message telling you that you have segments with invalid inline tags.

Quality Assurance

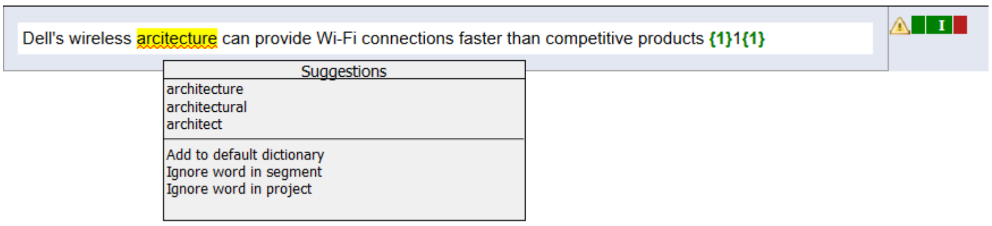
The quality assurance checks happen automatically when you set a segment to translated or when you click one of the QA icons . The icon on the right vertical toolbar is used to check only the active segment. Clicking the icon on the left vertical toolbar enables you to choose a broader range of segments for QA checks.



Options for QA checks

Spell checking

If a spelling mistake is detected during the check then the word is highlighted in yellow. If you click on the word then XTM displays a number of suggested spellings for the word. You then have the option to select one of the suggested words, add the suspect word to the custom default dictionary and ignore the word in this segment or in the whole project.



Correcting a spelling mistake

The spell checking utilises the open office dictionaries which cover more than 90 languages listed in Appendix 3. Separate custom dictionaries are created for each customer. This means that multiple translators working on projects for the same customer will use the same custom dictionary.

Other QA checks

Apart from checking the spelling the QA module also checks for:

Numbers

- Missing or incorrectly formatted number
- Numbers inside words

Punctuation

- Missing space after punctuation marks
- Multiple punctuation marks in a sentence

- Multiple spaces in a sentence
- Spaces before punctuation marks
- Spaces around inlines
- Spaces around double byte characters
- Trailing tabs or spaces at the beginning or end of a sentence
- Uneven number of opening and closing brackets

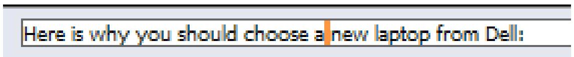
Language

- Check non-translatable text in curly brackets
- Forbidden characters – as specified by the system administrator
- Identical source and target
- Repeated words
- Spelling errors

Terminology

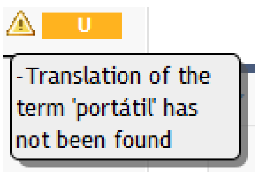
- Rejected terms used
- Translation of a term not found

When a QA error is detected an orange mark is inserted to highlight the problem.



QA error example - multiple spaces highlighted

In addition a warning triangle appears next to the status box. If you place your cursor over the triangle then a description of the problem appears.



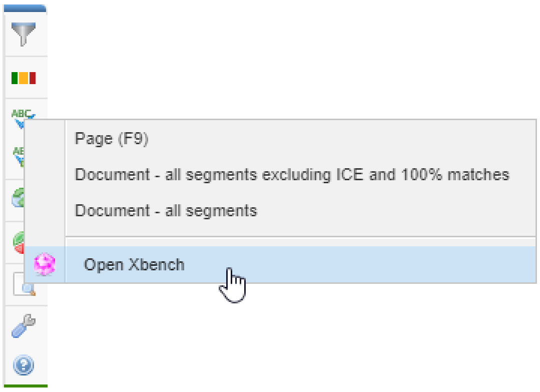
A typical QA warning

Integration with Xbench

Xbench is a third-party translation quality verification tool that can be opened from within XTM Editor. Xbench is not included in the XTM subscription and requires a separate license. The software can be purchased and downloaded from https://www.xbench.net/. XTM requires Xbench 3.0 build 1434 or higher installed on your computer.

Running Xbench from XTM Editor

Click Open Xbench in the quality verification menu to download the Xbench package (.xbpkg) file. The file can be then opened in Xbench for quality verification.

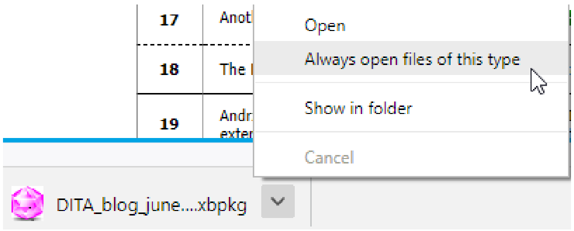


Opening Xbench from XTM Editor

Xbench can be opened straight from XTM Editor but requires your web browser to automatically open downloaded files.

For example, in Chrome:

a. Disable Google Chrome option: Ask where to save each file before downloading as explained in: https://support.google.com/chrome/answer/95759?co=GENIE.Platform%3DDesktop&hl=en
b. Enable Always open files of this type. Download an Xbench xbpkg file. When it is listed at the bottom of Chrome, click the up arrow, and choose Always open files of this type.



Always open files of this type in Chrome

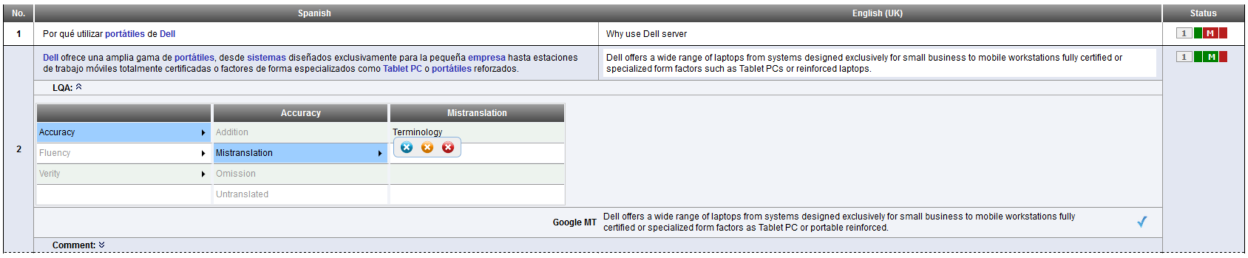
Activating segments in XTM Editor from Xbench

It is possible to activate a segment with an error in XTM Editor straight from Xbench. Press Ctrl + E when an error is selected in Xbench to activate the relevant segment in XTM Editor for correction. This feature only works when the same file is open in Xbench and XTM Editor.

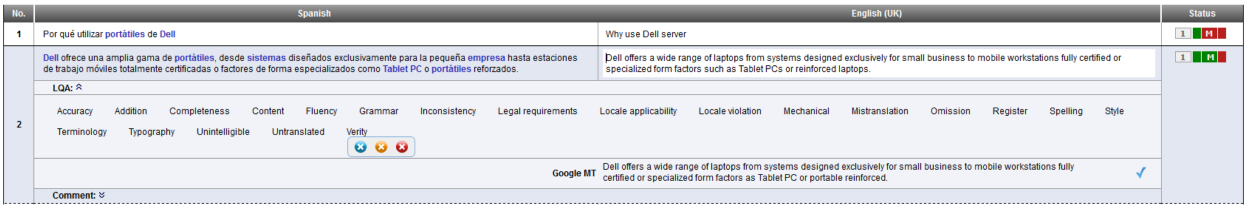
LQA marking

The system administrator will have configured LQA so that XTM lists the chosen issues. The severity factors and issue weightings will also have been set.

When a step in the workflow has been marked for LQA or the step is the default LQA step, an LQA section appears under the segment.



The LQA section for a segment – hierarchical view



The LQA section for a segment – Flat view

To enter an issue select the item in the LQA section and select the severity by clicking on either the blue, orange or red icons. The selected issue will appear in at the top of the LQA section and also an orange triangle will appear in the status column with a mouse over pop up giving the details.

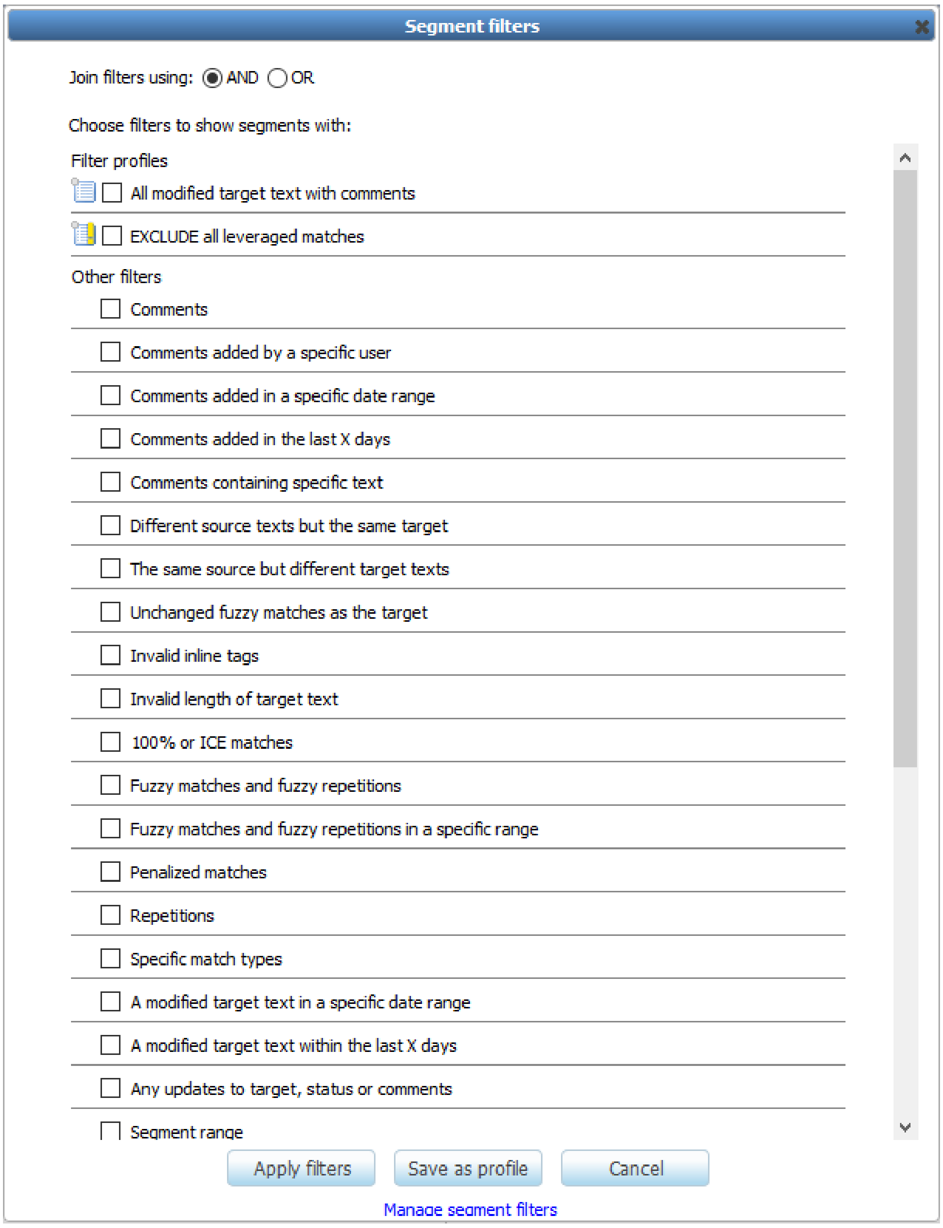
If the LQA is used as part of the correct step then marking the issue will record the error and as it is corrected XTM will create an auto comment.

The LQA report is automatically created and can be downloaded by the project manager from the context menu in the project listing.

Other XTM Workbench Features

Segment filtering

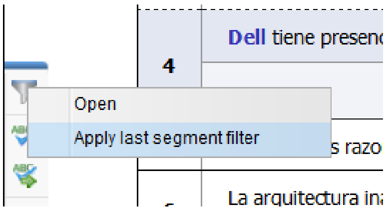
Clicking on the icon in the left hand tool bar brings up a list of segment filters that you can apply. Check the appropriate filter and click "Apply filters".



Selecting a segment filter

When one or more filters have been applied the icon appears in the XTM Editor title bar. If you click on this icon the filter is immediately switched off to show all segments.

If you right click on the apply filter icon a context menu appears which enables you to open the filter window or immediately apply the last segment filter.



Right click on the filter icon

There is also a keyboard short cut to apply the last segment filter or deactivate the applied filter. The default value of the keyboard short cut is Ctrl+shift+F

Filter Profiles

You can create advanced, customized filters by joining two or more segment filters together using Boolean AND/OR operators and saving the combination as a Filter Profile. You can also save frequently used configurations of a single filter for convenient reuse. Saved Filter Profiles appear in a separate list above the Other filters list with an icon to the left.

Creating filter profiles

Click on the icon in the left hand tool bar to open the Segment filters window:

1. Check the box next to one or more desired filters in the list and configure the filter parameters. Check the Exclude box to exclude segments matching that condition from the display.
2. If more than one filter is selected, choose whether to join the filters using the AND or OR Boolean operator using the radio buttons at the top of the window.
    a. The AND operator means all of the conditions must be matched for a segment to be displayed.
    b. The OR operator means that only one of the selected conditions must match segments to be displayed.
3. Click the Save as profile button.
4. In the Add filter profile box enter a descriptive name for the profile in the Filter profile name field, and click Save. The new profile will appear at the top of the Filter profiles list.

Applying filter profiles

Click on the icon in the left hand tool bar to open the Segment filters window. Check the box next to the filters you wish to use from the Filter profiles list and click the Apply filters button.

Profiles created by an Administrator

Filter profiles created by a system administrator are indicated in the list by an icon. You can apply these profiles normally, but administrator profiles cannot be edited. However you can view their settings by clicking the icon next to the administrator profile name and selecting View from the dropdown list. This opens the Edit filter profile window with a notification in yellow across the top that this profile was created by an administrator. You can modify the configuration of this profile and click Save as profile to save it as your own filter profile under a new name.

Modifying filter profiles

Click the icon to the left of the filter profile name and select Edit from the dropdown menu to open the Edit filter profile window. The current profile name, Boolean operator, selected filters and their parameters are all displayed in the window. Make any desired changes to the profile configuration and click Save profile to save your changes.

Deleting filter profiles

Click the icon to the left of the filter profile name and select Delete from the dropdown menu. Click OK in the confirmation box to delete the filter profile.

Copy repetition

The icon appears when you apply the filter “Repetitions”. If you make a change to one of the repetitions click on it to propagate a change to the other repetitions.

Centralising a segment

In order to view the last segments on a page in context with segments of the next page click the centralise segment icon .

Merging segments

In order to merge the current segment with the one above click the merge segment icon . There are some rules governing the merging and demerging of segments:

- You can only merge segments that originated from the same paragraph in the source document. In XTM Editor these segments are separated by a dotted line. You cannot merge segments from different paragraphs. These segments are separated by a solid line.
- When you need to merge more than two segments always start merging from the last segment – thus for example if you wish to merge segments1, 2, 3, firstly merge segment 3 with 2 and then 2 with 1.
- The converse applies when demerging segments – start demerging from the first segment.
- You cannot merge a segment with another segment that is in a read only state.

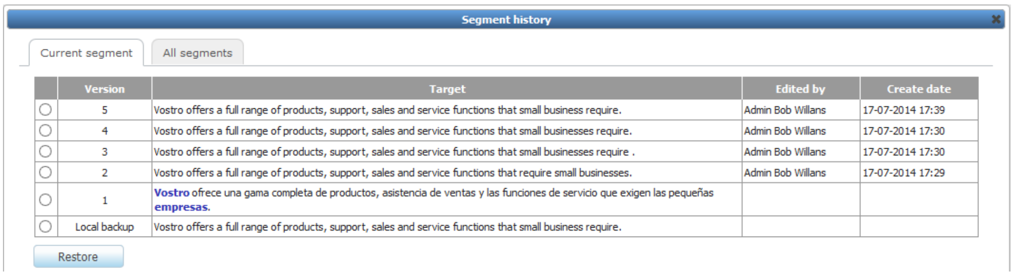
To demerge two merged segments, click in the segment that says “Merged with the segment above.” and click merge segment icon .

Saving, versioning and restoring previous versions

Every change that you make in a segment is automatically saved when you click away from the segment. XTM automatically stores a full version history of each segment. There are two storage mechanisms:

1. The changed segment is automatically saved on the server as a file.
2. In addition the segment is saved locally in the temporary cache of the browser. This acts as a backup if the internet connection is down.

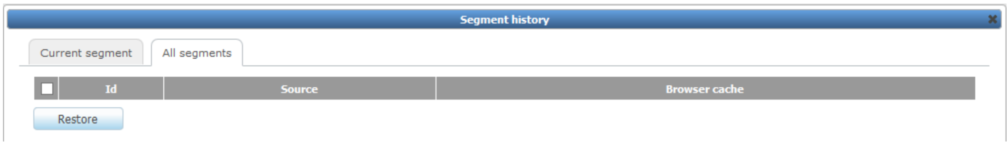
XTM adds to the history each time the segment is saved. The information includes the person who made the change and date and time of the change. To view the segment history click on the icon.



	Version	Target	Edited by	Create date
	5	Vostro offers a full range of products, support, sales and service functions that small business require.	Admin Bob Willans	17-07-2014 17:39
	4	Vostro offers a full range of products, support, sales and service functions that small businesses require.	Admin Bob Willans	17-07-2014 17:30
	3	Vostro offers a full range of products, support, sales and service functions that small businesses require .	Admin Bob Willans	17-07-2014 17:30
	2	Vostro offers a full range of products, support, sales and service functions that require small businesses.	Admin Bob Willans	17-07-2014 17:29
	1	Vostro ofrece una gama completa de productos, asistencia de ventas y las funciones de servicio que exigen las pequeñas empresas.		
	Local backup	Vostro offers a full range of products, support, sales and service functions that small business require.		

The version history window – current segment

From this window you can view and restore any previous version of the current segment.



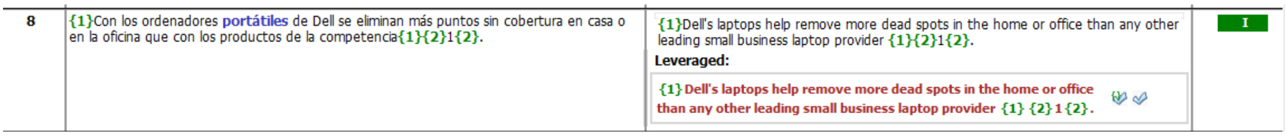
The version history window – All segments

On the second tab “All Segments” there is an option to restore the latest backup for any or all of the segments on the page.

Entering translations

If there is no TM match, to enter your translation, simply click in target language box of the desired segment and type over any source text.

If there is a TM match click to accept a fuzzy match and insert the translation into the target box. If the TM has been saved with inline elements there will be two options: click to copy the match without inline elements and click to copy the match with inline elements. In either case the text can then be edited as required.

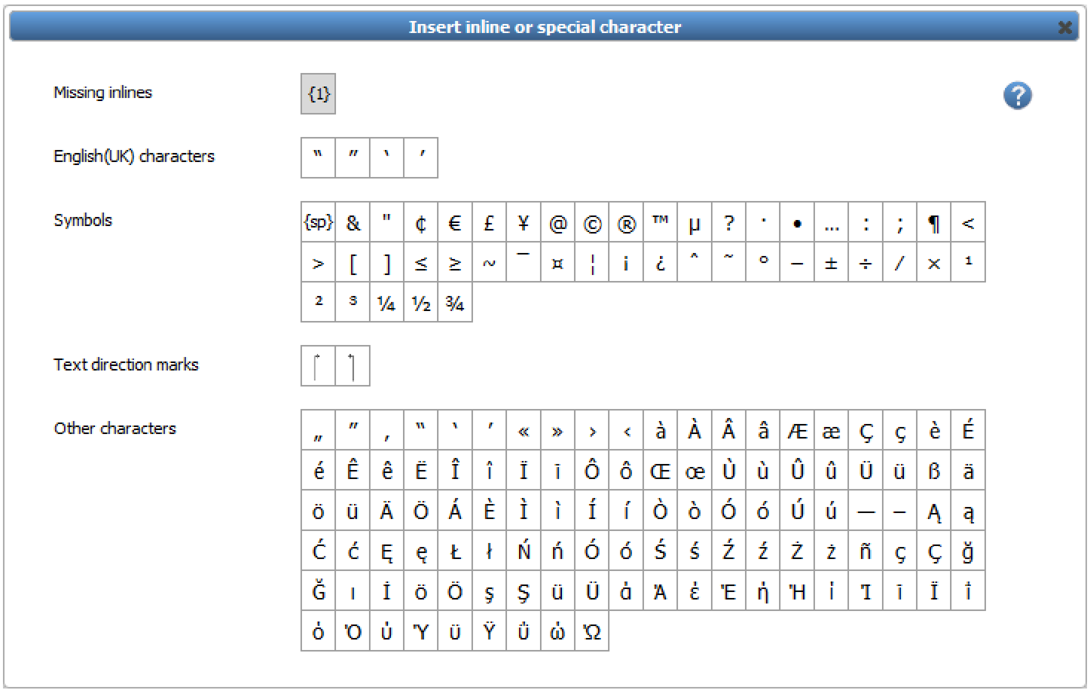


Selecting a TM match

Entering special characters in XTM Editor:

Sometimes you may need to enter characters that are not accessible from the keyboard, such as 'smart quotes'.

To enter characters that are special to the target language type alt+0.This will display a selection of characters for the given language including the default one - {sp}



The special character pop up

For 'special' characters that are not shown here the Windows Character Map is the best solution:

From Windows->Start->Accessories->System Tools select the Character Map

In the Character Map application select the characters that you will be using frequently into the 'Characters to copy:' field. You can then copy and paste the characters into the XTM editor.

You can also type the ASCII or ANSI code for the characters. Useful codes are:

- Alt+0132 for lower quote
- Alt+0147 for Left Double Quotation Mark
- Alt+0148 for Right Double Quotation Mark
- Alt+0139 for Single Left-Pointing Angle Quotation Mark
- Alt+0155 for Single Right-Pointing Angle Quotation Mark
- Alt+0128 for Euro Symbol

To enter these keystrokes you need to keep the Alt key pressed down, then on the numeric keypad press the number sequence.

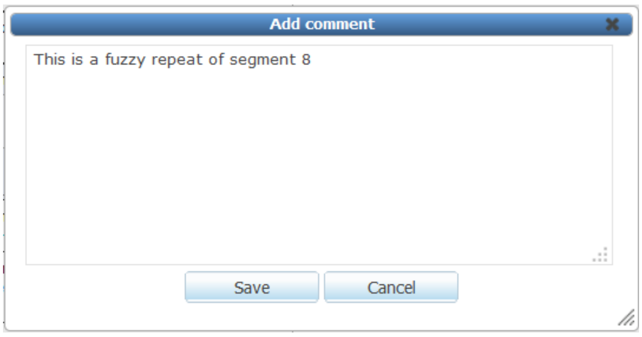
The full ASCII character set is available here http://ascii-table.com/ascii.php

The full ANSI character set is available here http://ascii-table.com/ansi-codes.php (note the Dec codes shown in the table require a leading 0 when typing them.)

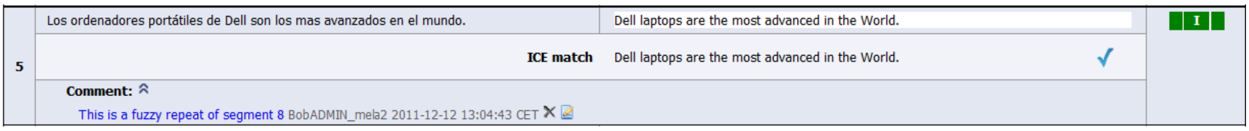
It is also possible to create shortcuts for commonly used special characters. By default insert non breaking space is set to Ctrl+Shift+space, but you can create other characters as required.

Segment comments

To add a comment to the active segment click on the  icon in the right hand tool bar. Enter the comment in the box that appears and click the save button. The comment is saved with the name of the person adding the comment and a date time stamp.



Adding a comment



A Segment with a comment

When a comment is present in a segment the word “Comment” appears. Click on the icon to display the text. You can change the default setting to display or hide comments in Settings > Options. A comment can be edited by clicking on the icon or deleted by clicking on the icon. Note only the person who entered the comment can edit or delete it, and this can only be done when the workflow step is active.

To view the next segment with a comment, click on the next comment icon in the right hand tool bar

XTM Editor Title bar

Starting from the left hand side, the title bar firstly displays an icon indicating the speed of connection to the XTM server . This icon turns to orange or red as the speed of connection falls.

Connection speed	Connection grade	Icon or warning message
>1900 milliseconds	Bad	
>1001<1899 milliseconds	Poor	
>601<1000 milliseconds	Average	
>400<600 milliseconds	Good	
<400 milliseconds	Excellent	

Next is the project name, the target language, the file name, the finish and reject buttons and the segment range or ranges and your role. If you have been allocated multiple languages or files in the same project it is possible to navigate through the languages or files from the pull down menu or using the arrows to the left and right of the file name.

Finishing or rejecting tasks in XTM Editor: If the manual option has been selected in Configuration depending on the step you are in there are two arrows: Clicking on the red arrow icon rejects the task to the previous step in the workflow, while the green arrows finishes the task and automatically moves it on to the next step in the workflow. If XTM has been set up so that tasks are automatically finished or rejected depending on the segment status, then the arrow icons change to the following red/green icon

If segment filtering is switched on a small red filter icon appears: . Clicking this icon switches off segment filtering so that all segments are displayed.

The XTM Editor title bar with a pull down lists of available file names and languages.

Navigation within the document

Each page on the editor contains between 10 and 500 segments. You can set how many segments you wish to view on a page in the setting section which is accessed by clicking on the icon.

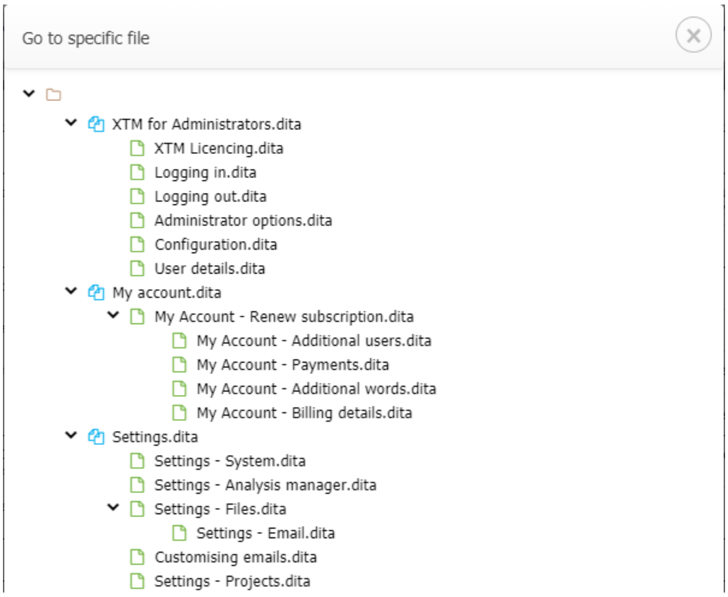
You can move to the next page of segments by clicking on the range at the bottom or top of the page, clicking on the arrows or selecting a range from the pull down list. Alternatively go to a specific segment by entering the segment number in the empty box.

The navigation panel at the bottom and top of the page

When determining how many segments to display on the page you should bear in mind that when you have a page open, other translators, reviewers or correctors will be able to view this page, however they will find that all the segments on the page are locked and they will not be able to make any changes.

Navigation between joined files

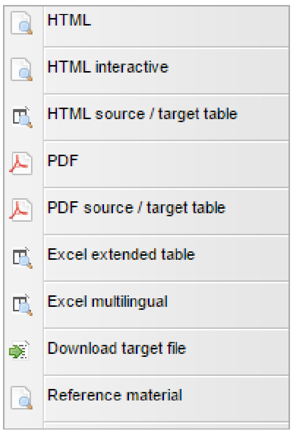
When files, such as DITA source files, are joined during project creation, you can easily navigate through them by clicking the icon. This displays the file structure tree. The structure of the tree depends on the file join settings described [here](#).



A typical file tree structure

Target file preview

Clicking on the preview icon in the left hand menu displays a submenu that enables you to select the type of document preview as shown below.



The preview menu

If you are translating XML files, XSLT style sheets can be used to generate a preview. The selection of style sheet can be configured using the root element of the source XML file. Please contact support@xtm-intl.com to request assistance with loading the style sheets into XTM.

If there are no custom style sheets DITA previews are based on the DITA Open Tool Kit Framework. The target XML is passed to style sheets and rendered as HTML.

XTM Connect for Adobe InDesign

If the optional connector for XTM to Adobe InDesign Server has been purchased there is additional preview functionality. The InDesign Server can be either licenced by the customer or we can provide access to the XTM International instance.

This connector provides the ability to:

5) Upload and analyse .indd files

6) Generate a WYSIWYG pdf of the target file
7) Quickly and easily edit the translation. The preview pdf contains Live-Links from the text in the preview to the relevant segment in XTM Editor.

Images need to be either embedded into the InDesign document or contained in Links folder that is uploaded to XTM by the project manager as preview files.

Segment status

Segment status overview

The right hand column displays information about the status of the segment and origin of the target text.

The background colour represents the current status of the segment. The meaning of the colours is as follows:

COLOUR	STATUS OF STEP	MEANING
RED	TO BE TRANSLATED TO BE REVISED TO BE REVIEWED	The segment requires the linguist's attention.
YELLOW	TO BE CHECKED	The segment is non-translatable or is a 100% leveraged match
BLUE	TO BE CORRECTED	The segment has been rejected by one step (e.g. Review) and needs to be corrected by the previous step.
GREEN	TRANSLATED REVISED REVIEWED	The segment has been completed by the linguist
	COMPLETED	The segment is an 'In context exact' (ICE) match, or has been merged with the one above

The letters in the status box refers to the original matching type and have the following meaning:

LETTER	MATCHING TYPE
U	Unmatched
MT	Machine translation matched
M	Matched
I	In context exact match (ICE)
N	Non-translatable

The only change that you can make to the letter in the status box is to change it to "N", otherwise it remains the same throughout the workflow.

The status of the previous and following steps

A segment showing the status of the previous, current and next step.

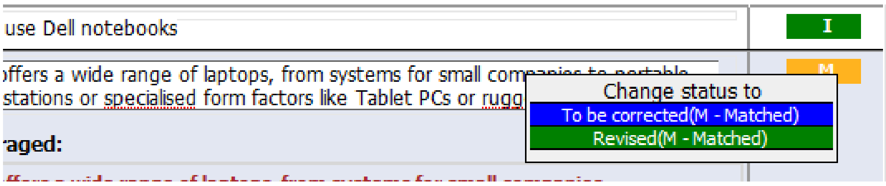
The status column displays the status of the previous, current and next step in the workflow by dividing the coloured block into sections. In the example above the first step is completed, while the current and next step require attention.

Changing the status of segments

You can set XTM to change the segment status automatically or alternatively you can manually set the status.

If the system is configured to change the status of the segment automatically, when you leave the segment the status will change. How to set the status change to automatic is described in chapter 5 in the configuration section.

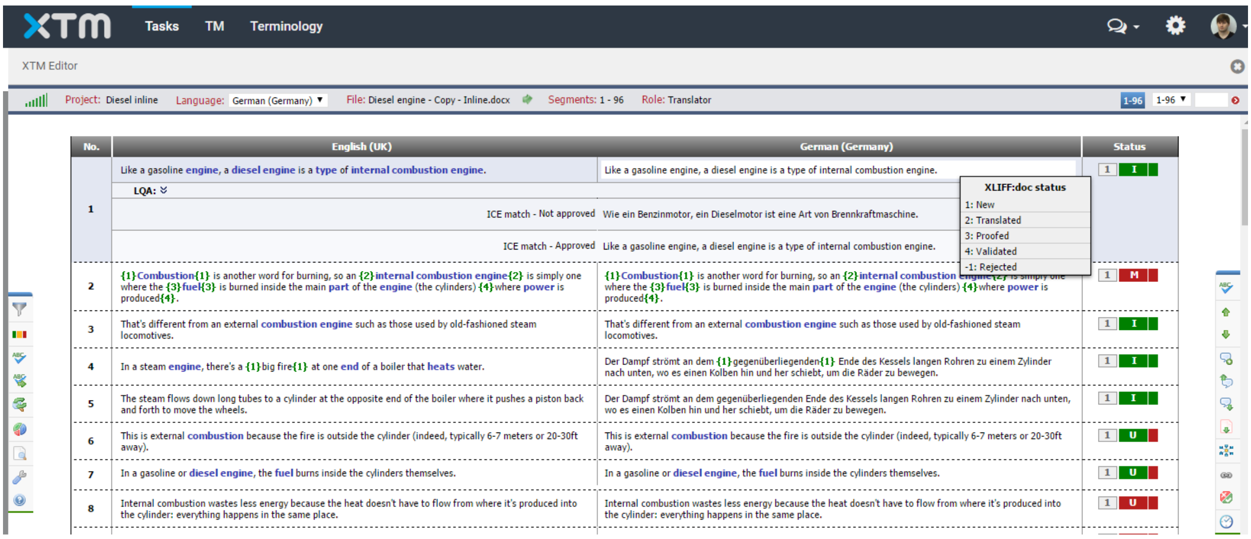
If the status change is not set to automatic then you may change the status using the keyboard shortcut Alt ++ or by clicking on the box itself and selecting translated/revised/reviewed from the context menu.



A reviewer changing the status of a segment

XLIFF:Doc status of segments

If you have TIPP switched on in Configuration> Settings then the XLIFF:doc segment status will be displayed in XTM Editor to the left of the normal XTM status. To change the status of a segment click on the number and select the desired status from the pop up list.



Changing the XLIFF:doc status of a segment

Locked segments

If a segment is grey and has a padlock icon to the right of the segment status then it is locked and changes cannot be made. To view why the segment is locked move your mouse over the padlock. The reasons why a segment maybe locked are:

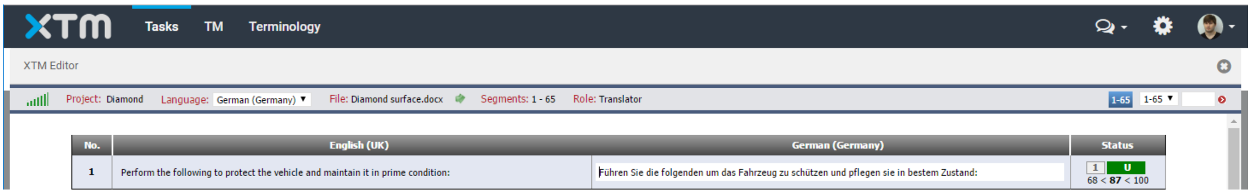
- The segment is not allocated to you
- This segment has not been completed in the previous step
- The segment is locked by another user
- ICE matches have been set to “not editable”
- You are a viewer and do not have editing rights

It is important that users close XTM Editor by either logging out or closing the browser, because if a user leaves the XTM Editor open unattended, then the session will expire in one hour and all the segments on the page will be locked during this time. However, if a translator closes XTM Editor then the session will expire after 5 minutes freeing up the segments for other users.

Target Text Length Control

XTM can be configured during project creation or in the project editor to monitor the number of characters in the target text and compare that number with predefined upper and lower limits. When the number of characters is less than or greater than these limits the segment will appear red and a warning will appear.

XTM controls the target length of a paragraph and not a sentence. These segments are separated by a dotted line in XTM editor. Thus for example when translating an Excel file, XTM controls the length of all the text in a cell or in an XML file all the text in an element.



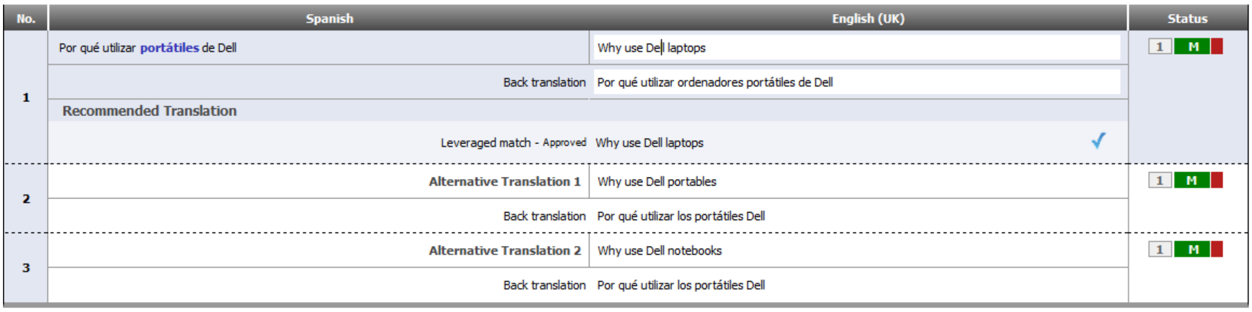
Segment showing target text length control in the status column

Alternative and Back Translations

When a project has been created to use the alternative translation feature each segment is displayed multiple times. There is a recommended translation followed by the set number of alternative translations. Each alternative translation has its own back translation. Also XTM uses paragraph segmentation for projects with alternative translations.

Enter the alternative translations and back translations. The comments section can be used as a place to enter the rationale for each translation. On review choose the desired alternative translation by clicking on the check to copy from the alternative to recommended translation. Only the recommended translation will be used to generate the target document.

An Excel spreadsheet can be downloaded by the project manager that shows the full list of translations, alternatives, back translations and comments.



Segment showing two alternative translations with their corresponding back translations

Storing and Updating the Translation Memory

Storing TM

The translation memory database is automatically updated when you modify the target text and leave a segment. All subsequent modifications to this translation automatically update the TM.

You do not have to mark a segment as DONE (green) in order to save it in the TM. However in order to store a segment where the target is equal to the source, you should mark the segment as DONE (green).

When the same segment from the same file and project is modified, the appropriate TM entry is updated. In other words, if you translate a segment, and then a corrector updates the translation, only the newest version will be stored in TM. When a segment is modified, its timestamp is updated. The timestamp is used to order the matches and display the most recent.

Every TM entry is stored with checksums of the previous and next sentences in the document. This allows XTM to be able to identify an ICE match that is based on the sentence context within the document.

Approved vs. not-approved memory

When the status of the TM entry is set to “Approved” or “Not approved” depends on the setting in the workflow. By default if there are multiple steps in the workflow then the TM entry is initially set to “Not approved”. When the final step in the workflow has been completed the TM entry is automatically set to “Approved”.

The setting can be adjusted, so segments can be stored as “Approved” in any step. In addition to this, a special workflow can be configured so that all segments are stored as “Not approved” until the last step is finished. Then an automatic process can be run that approves the memory on completion of the workflow.

Duplicate management

When you are working on a different project, but translate sentences that already exist in the TM, XTM will create a duplicate when:

1. The target text is different from that in the TM
2. The previous or next sentence are different from that stored in the TM

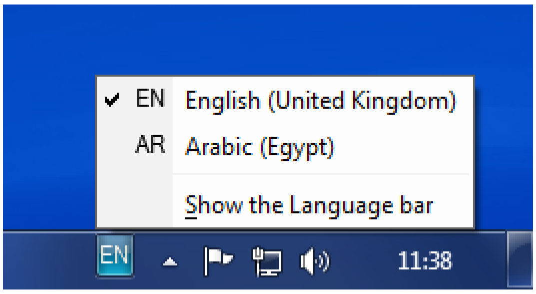
An administrator can configure XTM so that it does not create a duplicate TM entry for the same segment translated in different projects. If this is set and the segment already exists in the TM, when you enter a different translation, XTM will not create a new entry in the TM, rather the existing one will be updated with the new translation. To set this option go to Configuration > Settings > Translation and check the desired options in the field called “Modify the existing TM record if the project segment has the same”

Right to Left languages

The following languages are automatically set to display right to left in XTM Editor:

- Arabic
- Hebrew
- Divehi
- Pashto
- Persian
- Syriac
- Urdu
- Yiddish
- Yiddish, Israel

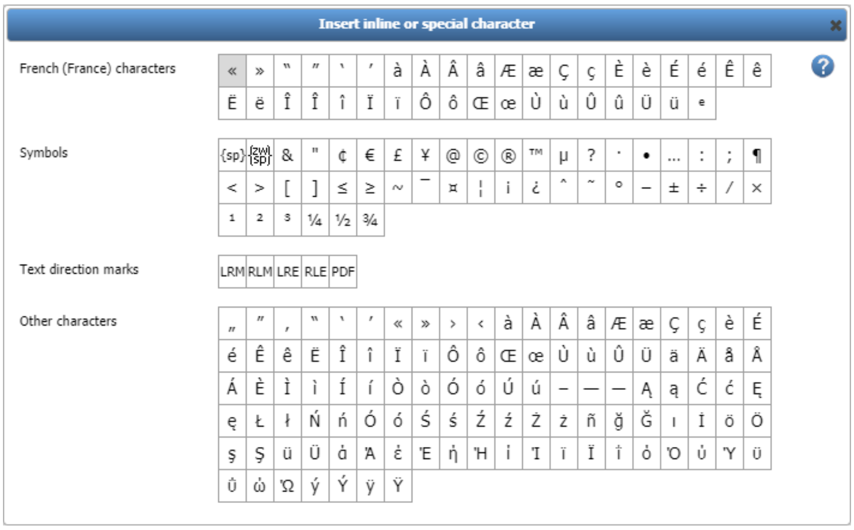
For PCs running Microsoft Windows, to change the keyboard firstly ensure that the desired language is installed. This is done in Control Panel > Region and Language > Keyboard and Languages. Once installed it is possible to select the desired language from the pop up menu at the bottom right of the screen.



Selecting keyboard input language

Bidirectional texts

When you need to type some text in direction opposite to the direction of the target language, you can use text direction marks. Text direction marks are available from the Insert inline or special character pop-up window.



Text direction marks in the Insert inline or special character window

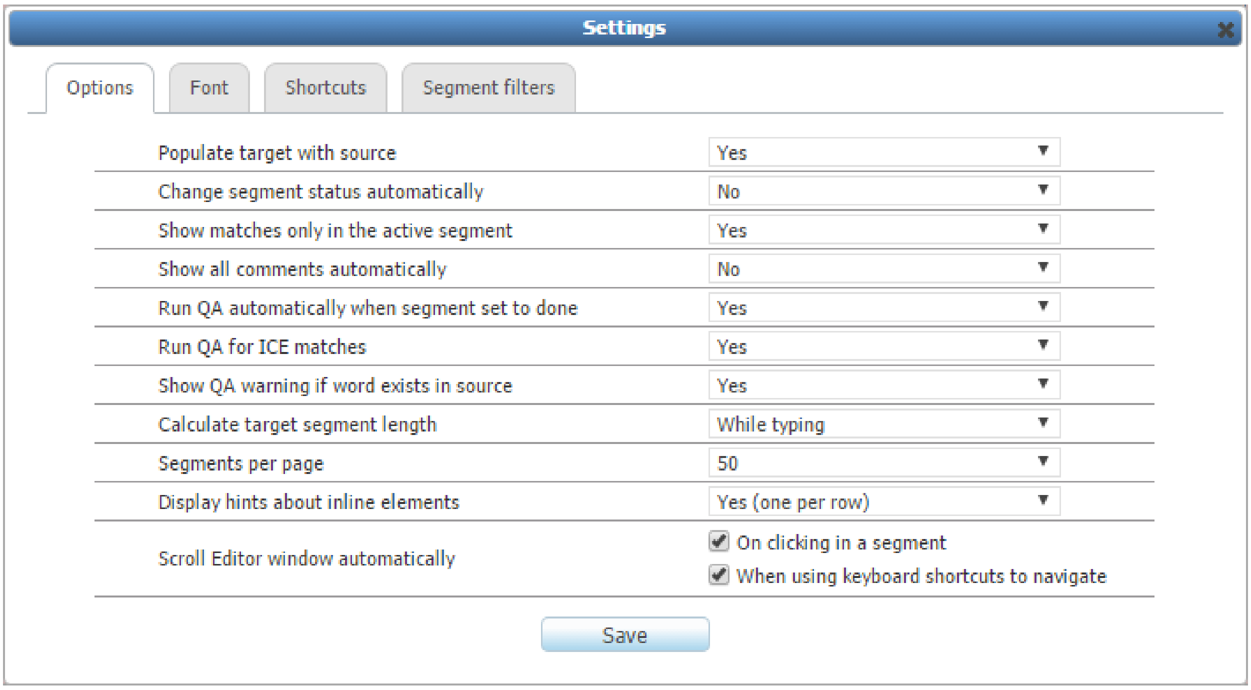
LRM, RLM, LRE and RLE are opening text direction marks. LRM and LRE change text direction to left-to-right. RLM and RLE change text direction to right-to-left. PDF is a closing mark.

An example of bidirectional text

Configuration

There are 4 tabs in the configuration window: Options, Font, Shortcuts and Segment filters

Options

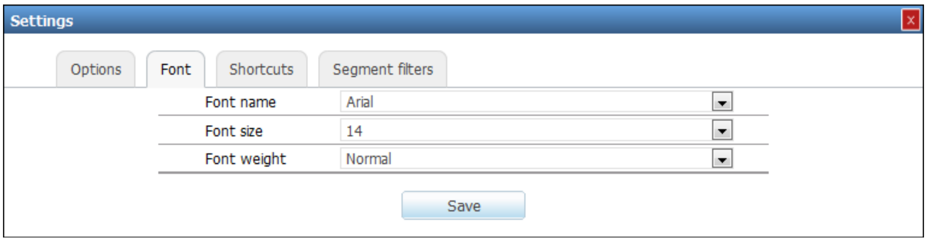


The Settings window - Options

The functionality that can be set under options is:

- Populate target with source
- Change status automatically
- Show machine translation matches
- Show matches only in the active segment
- Show all comments automatically
- Run QA automatically when the segment is set to done
- Run QA for ICE matches
- Show a QA warning if a word exists in the source text. By default this set to “no” and is important to avoid false positives if your source text contains words or tokens that are not translated.
- Calculate target segment length while typing or when leaving the segment – This is only active when segment length monitoring is on.
- The number of segments displayed per page. Use a lower number to have better performance
- Display hints about inline elements underneath the segment
- Automatically scroll window when using shortcut or mouse

Fonts

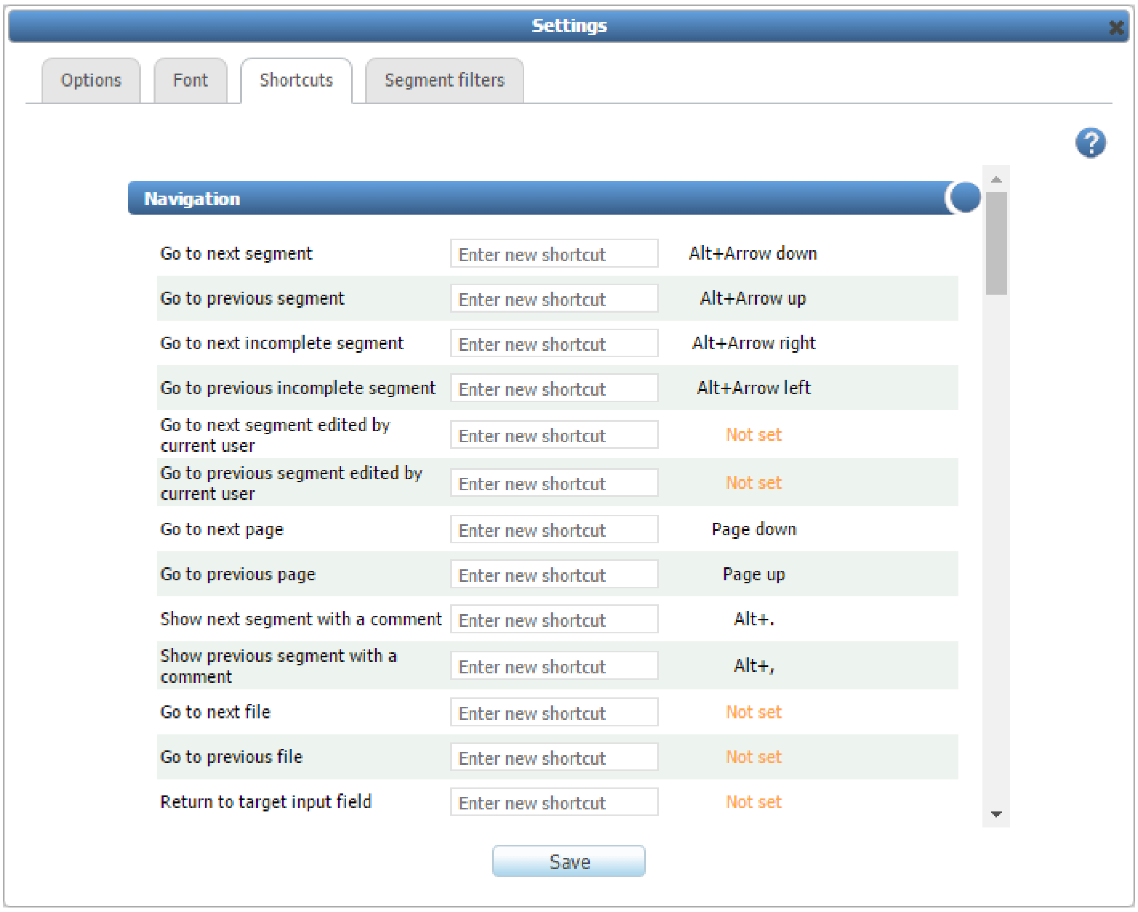


The Settings window – Fonts

The fonts used in the XTM Editor can be set here. It is important that you select the right font for the project target language. The fonts are as follows:

Font	Target language
Simsun	Chinese
MS Mincho or MS Gothic	Japanese
DaunPenh	Cambodian
Preeti	Nepali
Vrinda	Bengali

Keyboard shortcuts



The Settings window – Shortcuts

This window allows you to view the current keyboard shortcuts and to customise them. To change a shortcut click in the “Enter new shortcut” box and type the new shortcut, then click save. Due to the inconsistencies of some browsers the shortcut keys may not display correctly in the third column. In this click on it and a window will appear where you can update the shortcut keys displayed.

The shortcuts are browser specific, so any changes to the shortcuts will only be available in the browser in which they were set. Other browsers will keep the previous shortcut.

The default Mac shortcuts only apply when XTM is viewed in Safari. There might be changes to the shortcuts if other supported browsers are used.

The default settings are shown below.

Description	Shortcut for PC	Shortcut For Mac
NAVIGATION		
Go to next segment	Alt+Arrow down	Alt+Arrow down
Go to previous segment	Alt+Arrow up	Alt+Arrow up
Go to next incomplete segment	Alt +Arrow right	Alt +Arrow right
Go to previous incomplete segment	Alt+Arrow left	Alt+Arrow left
Go to next segment edited by current user		
Go to previous segment edited by current user		
Go to next page	Ctrl+Page down	Ctrl+Page down
Go to previous page	Ctrl+Page up	Ctrl+Page up
Show next segment with a comment	Alt+.	Alt+.
Show previous segment with a comment	Alt+,	Alt+,
Go to next file		
Go to previous file		
Return to target input field		
TRANSLATION/TARGET		
Set segment as completed	Alt+;	
Set segment as completed & go to next incomplete segment	Alt++	Alt++
Set segment as incomplete	Alt+-	Alt+-
Save/do not save translation in TM	Alt+/	Alt+/
Clear the target segment	Alt+Delete	Ctrl+Delete (
Copy source text to target text	Alt+Insert	Ctrl+Shift+I
Insert no-break space	Ctrl+Shift+space	Ctrl+Shift+space
Insert zero-width space		
Uppercase/lowercase selected text	Shift+F2	
Merge with the segment above	Alt+Page up	ctrl + u
Focus custom attribute	Tab	Tab
Insert term	Ctrl+shift+T	
Undo	Ctrl+z	Ctrl+z
Redo	Ctrl+y	
Delete text to the end of the segment target	Not set	
Delete text to a next inline tag	Not set	
TEXT FORMATTING		
Bold		
Italic		
Underline		
Strike		
Superscript		
Subscript		
Hyperlink		
New line		
MATCHES		
Write match without inlines (If multiple matches selects best one)	Alt+m	Alt+m
Write match with inlines (If multiple matches selects best one)	Alt+i	Alt+i

Confirm & go to the next segment selecting the best match	Enter	
Write second match with inlines	Alt+Ctrl+2	
Write third match with inlines	Alt+Ctrl+3	
Write fourth match with inlines	Alt+Ctrl+4	
Write fifth match with inlines	Alt+Ctrl+5	
Write sixth match with inlines	Alt+Ctrl+6	
Write seventh match with inlines	Alt+Ctrl+7	
Write eighth match with inlines	Alt+Ctrl+8	
Write ninth match with inlines	Alt+Ctrl+9	
INLINE TAGS		
Insert inline or special character	Alt+0	Alt+0
Write first inline tag	Alt+1	
Write second inline tag	Alt+2	
Write third inline tag	Alt+3	
Write fourth inline tag	Alt+4	
Write fifth inline tag	Alt+5	
Write sixth inline tag	Alt+6	
Write seventh inline tag	Alt+7	
Write eighth inline tag	Alt+8	
Write ninth inline tag	Alt+9	
COMMENTS		
Add comment	Alt+c	
QA		
Check current segment	F7	
Go to next page with QA warnings	F10	F4
Remove QA marking	F8	
Run QA on this page	F9	F3
Show/hide LQA form	Ctrl+q	
GENERAL		
Close popup	Esc	Esc
Apply/disable last segment filter	Ctrl+shift+F	
Open concordance	Alt+\	Alt+\
Concordance search in source language	Not set	
Concordance search in target language	Not set	
Refresh page	F5	F5
Show metrics	Alt+Enter	
Show find and replace	Alt+f	
Close the docked panel		

Custom shortcuts for special characters

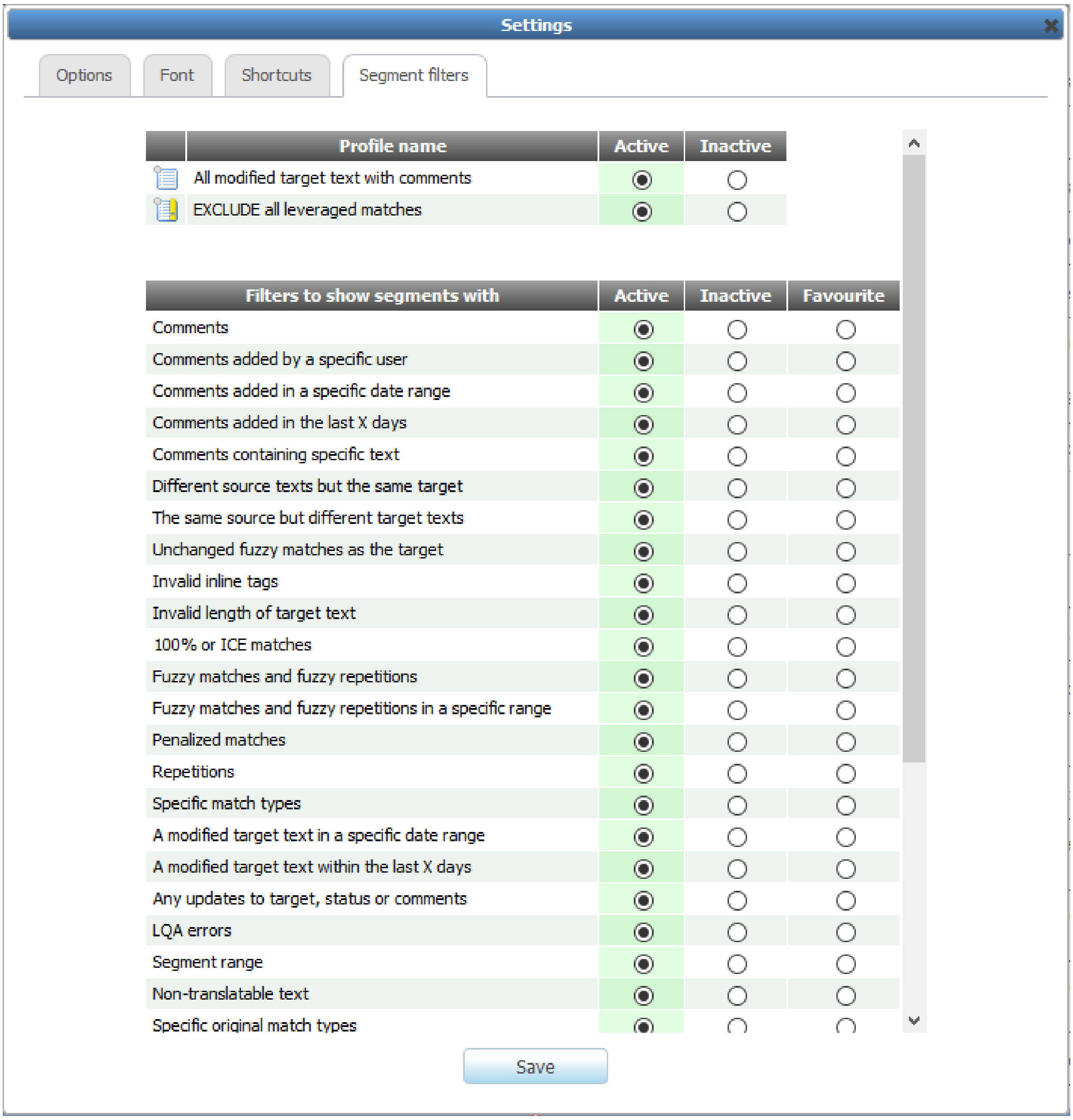
You can create your own shortcuts for special characters. Click the Add new shortcut button and then enter the character or click on the keyboard icon and select it from the popup. Then enter your desired shortcut.

Segment filters

The segment filter tab allows you to customise the list of filters and filter profiles that you see by making them "Inactive" and not visible in the list. Filter profiles appear in a separate list above the individual segment filter list. Filter profiles created by an administrator are indicated by an icon. Profiles created by an administrator can be used normally but cannot be edited.

Segment filters can additionally be marked as "Favourite" which causes them to be displayed at the top of the list. By default all the filters are active and none are marked as favourite. Your system administrator can change these default settings.

Select filters and profiles to be Active, Inactive or Favourite and click Save to save your settings.

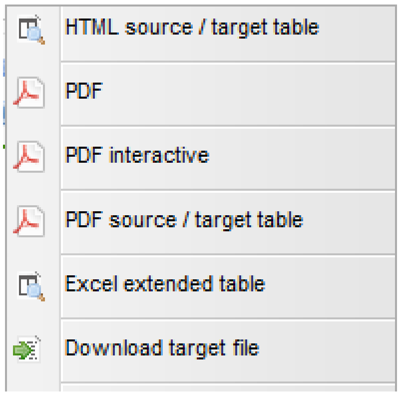


The Settings window – Segment filters

Toolbars

Left hand tool bar

The left hand tool bar relates to the page or file.

Icon	Action	Description
	Segment filtering	A pop up window appears to allow you to select and apply segment filters
	Change segment status	Allows you to batch change the XTM or XLIFF:doc segment status of all the segments on the page or allocated to you.
	Quality Assurance	Checks spelling and QAs all the segments on the page.
	Quality Assurance	Checks the whole document and goes to the next page with QA warnings.
	Find & Replace	Brings up the Find & Replace window.
	Metrics	A pop-up window appears with statistics about the translated document and progress in translation process. Includes Matching and number of text units.
	Preview	A menu appears that varies according to your type of source file and how your system is configured. The options are to preview the document as an HTML table, PDF, PDF interactive, PDF table, Excel extended table or HTML and the target file. 
	Customisation	Customise XTM Editor functionality, appearance, fonts, keyboard shortcuts and segment filters.
	Help	Description of all the system's functions.

Right hand tool bar

The right hand tool bar relates to individual segments.

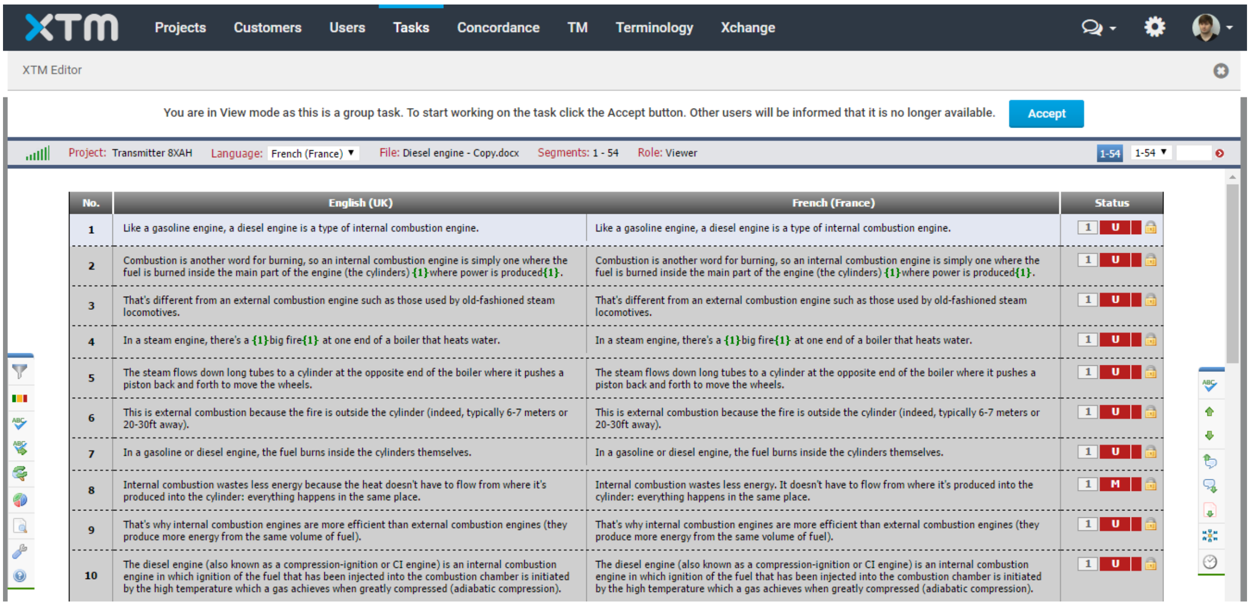
Icon	Action	Description
	Quality Assurance	Checks spelling and punctuation. Is also triggered by clicking F7 or works automatically when moving to the next segment.
	Previous incomplete translations	Moves user to the previous incomplete translation (the previous segment with a red status)
	Next incomplete translations	Moves user to the next incomplete translation (the next segment with a red status)
	Add comment	Creates a field in the source segment to insert a comment.
	Go to previous segment with comment	Moves user to the previous segment with a comment.
	Go to next segment with comment	Moves user to the next segment with a comment.
	Go to next segment with inline errors	Moves user to the next segment with an inline error.
	Centralize this unit	Puts the chosen segment in the centre of a page.
	Merge	Merges chosen segment with the unit above.
	Set as non-equivalent in TM	Sets a segment (a source-target pair) as non-equivalent in the Translation Memory and will not be reused. Clicking again undoes this action.
	Segment history	The pop up window has two tabs: The first tab shows the complete history of the segment allowing you to restore to any previous version. There are 2 options: 1. Restore from previous version stored on the server 2. Restore from the local backup On the second tab there is an option to restore the latest backup for any or all of the segments on the page.

Group tasks

There are two types of users group in XTM
1) First come first served groups
2) Allocation order group.

If you are a member of an XTM first come first served user group and the project manager has assigned a task to the group, you will receive an email advising you. Clicking on the task link in the email takes you to the log on screen in XTM and then opens XTM editor in view only mode. On a first come first served basis you will then be asked to accept the task.

If you click the accept button the task is then allocated to you and the other members of the group will receive another email advising them that it is no longer available.



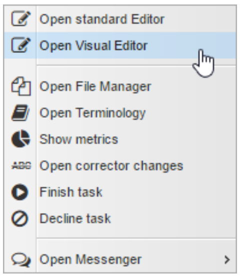
Accepting a task assigned to a user group.

If you are a member of an XTM allocation order user group and the project manager has assigned a task to the group, the task will be automatically sent to the first person in the group. They can accept or reject it. If they decide to reject it then it is automatically sent to the next person in the group and so on until one of the users accepts the task.

If you are a member of an XTM first come first served user group and the project manager has assigned a task to the group, you will receive an email advising you

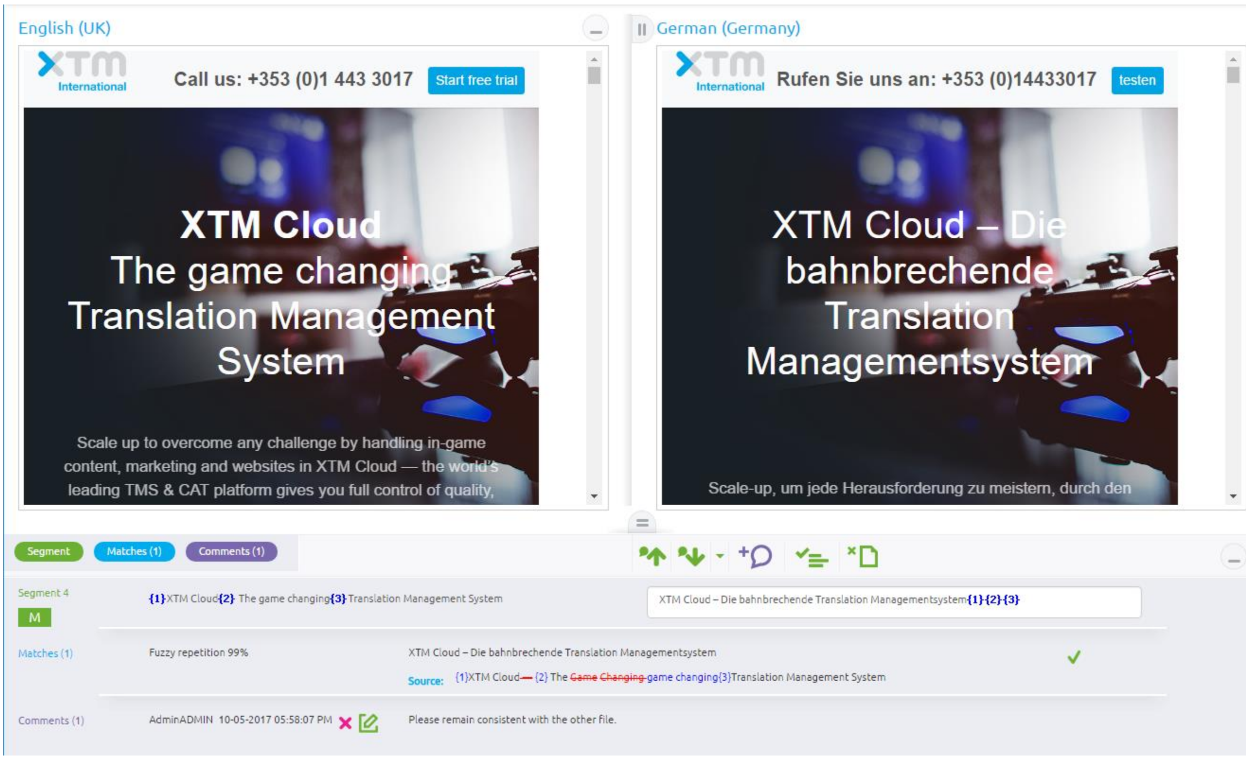
XTM Visual Editor

The XTM Visual Editor is available for HTML and XML source files. Depending on the type of XML file, in order to view XML files in the Visual Editor it is necessary to configure the system with the relevant XSLT style sheets, prior to creating the project. The XTM International support team can provide assistance to do this.



The Tasks context menu

The aim of the XTM Visual Editor is to show you a preview of the source and target file and then allow you to click on the text in the preview and enter a translation in the section below. The target preview is immediately updated with the translation. This allows you to see the full context of your translation as you are working.



XTM WYSIWYG Editor

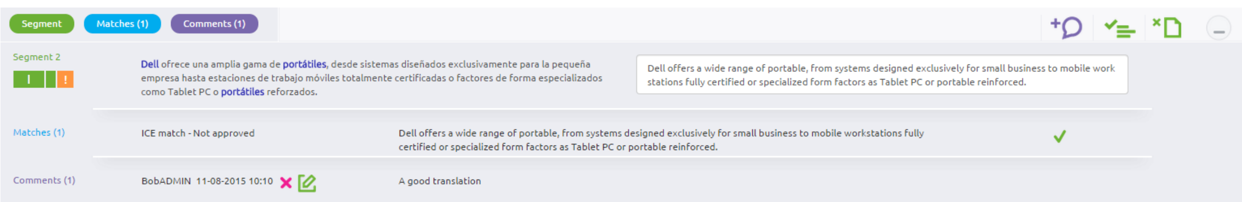
A great deal of the functionality in the tabular editor has been incorporated in this WYSIWYG editor. The icons you see in the window are as follows:

Icon	Action

	Go to the next/previous incomplete segment
	Go to the next/previous segment with a comment
	Add comment
	QA Check
	-
	View segment history
	Do not save in TM
	Select a match and insert the text into the translation
	Edit a comment
	Delete a comment
	Vertical resizer
	Horizontal resizer
	Minimise/maximise the segment editing section
	Settings
	Drop down menu
	Finish or reject a task
	Finish a task
	Reject a task

The layout of the page can be customised by using the vertical or horizontal sliders and the minimise/maximise button. This allows you to allocate more or less space to the previews and the segment editing section.

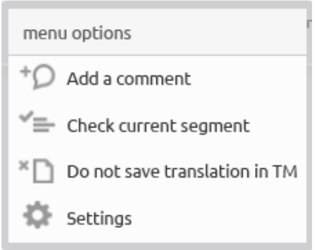
In the segment editing section it is possible to switch on or off the display of the segment, matches, and comments by clicking on the coloured buttons.



XTM WYSIWYG Editor – Editing a segment

The segment status is shown on the left hand side together with the status of the previous and next steps if applicable. Left clicking on the segment status allows you to change the status manually.

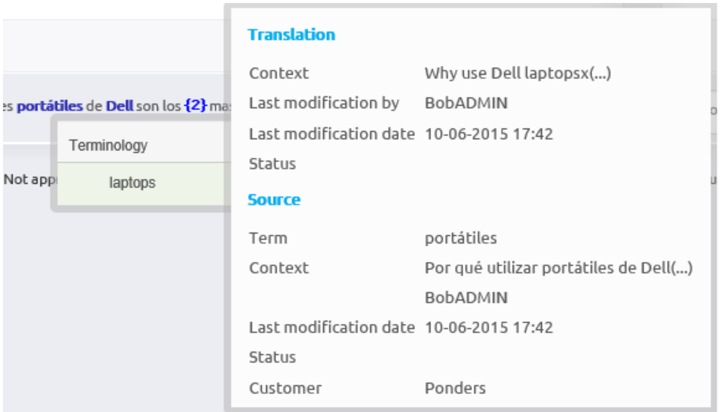
Right clicking anywhere in the segment brings up context menu.



Segment Context menu

To select a match to use as the translation click on the green tick

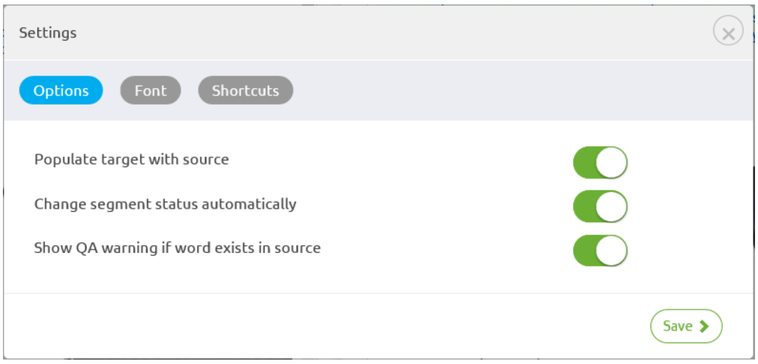
Terms are highlighted in blue and clicking on a term displays the term meta data in a pop up window.



Term meta data

The drop down menu in the top bar allows you to view or hide text decoration. When decoration is on an in-context exact match (ICE), the text is highlighted in light green, and the current segment is highlighted in yellow.

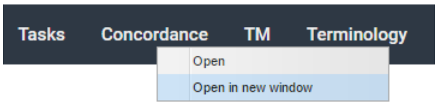
Clicking on the setting icon brings up the following window:



The settings window

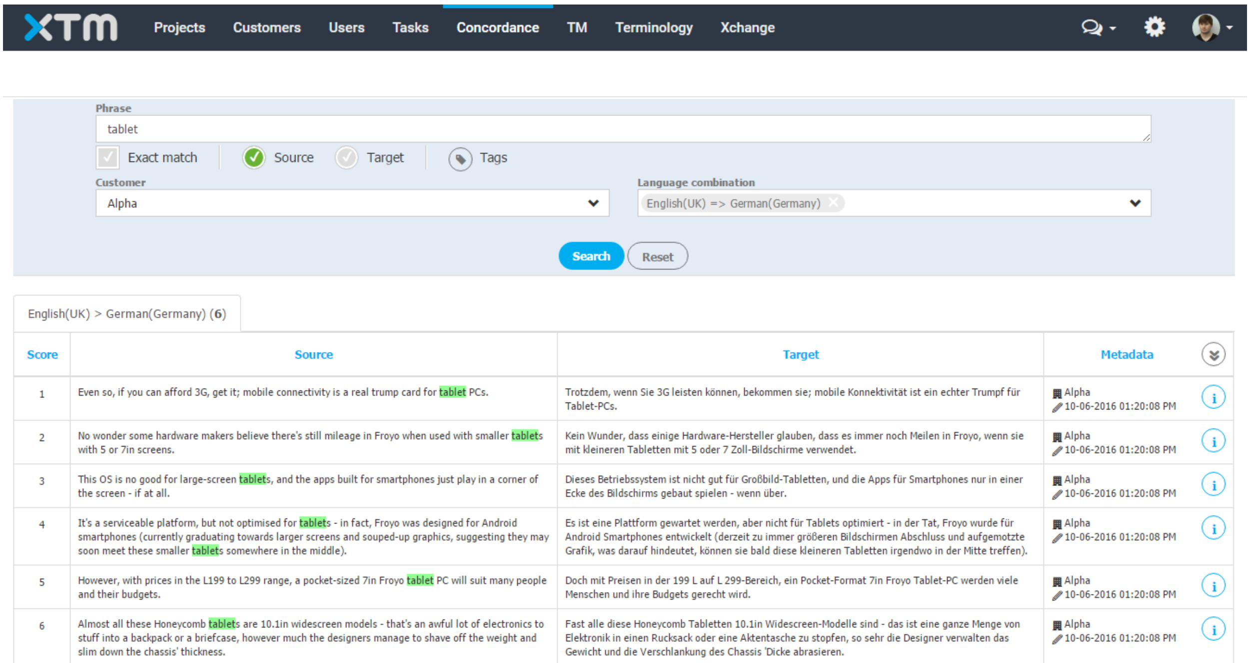
The concordance window

The concordance tab will be present for a linguist if the system administrator activates it under the Configuration tab > Server settings > Translation. This window allows users to have access to concordance even when they are not using XTM Editor. For easy access it is possible to open concordance in a separate window. You can do this by right clicking on the tab and selecting “Open in new window” from the context menu.



Right clicking on the concordance tab

By entering a word or phrase and clicking the search button XTM will display all occurrences and context of the word or phrase in the document and also the TM. By default the XTM searches on the stem of the word, but by clicking the box you can force it to search only for exact matches. You can also determine whether the search is with the TM for a specific customer or the whole TM.



The concordance window

6. XTM Off-Line Editor

Introduction

The XTM Offline Editor is a self-contained Microsoft Excel application to allow you to translate, correct and review off-line. The only software that you need to install to use it is a correct version of Microsoft Excel.

The XTM Offline Editor works in similar manner to the online, browser based version of XTM Editor. If you have used the XTM Editor then you will be familiar with the main principles of the XTM Offline Editor. Comments appear as Excel comments, to the right of the target segment column.

Minimum software requirements

The following software configuration is required to run the XTM Offline Editor:

1. Microsoft Windows XP or later
2. Microsoft Excel 2007, 2010 or 2013 32 bit edition

The application will run with 64 bit editions of Excel, but with some limitations. We recommend that you install the 32 bit edition.

The application runs with MS Office 2011 for the Mac

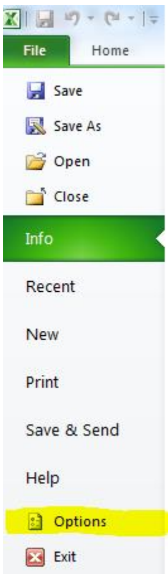
Minimum hardware requirements

Windows PC with a minimum of 512Mb RAM and a Pentium 4 processor or above, Core 2 duo or better preferred.

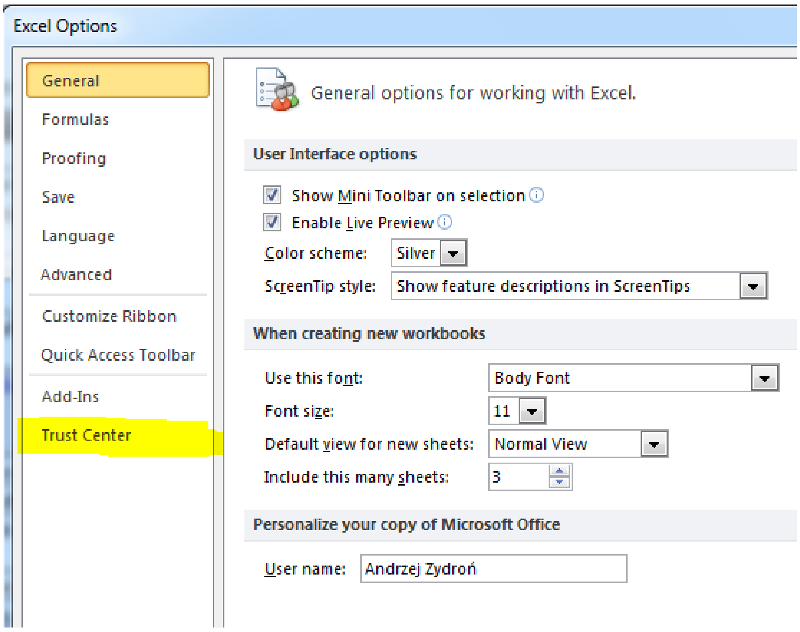
Enabling Macros

Please make sure that you have enabled macros in Excel:

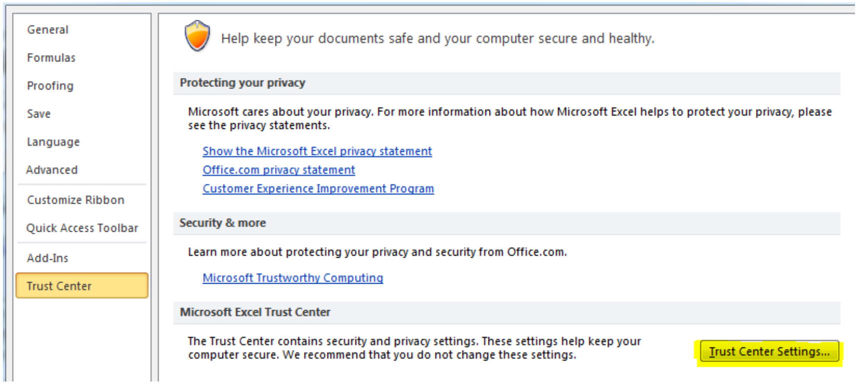
1. Select File->Options:



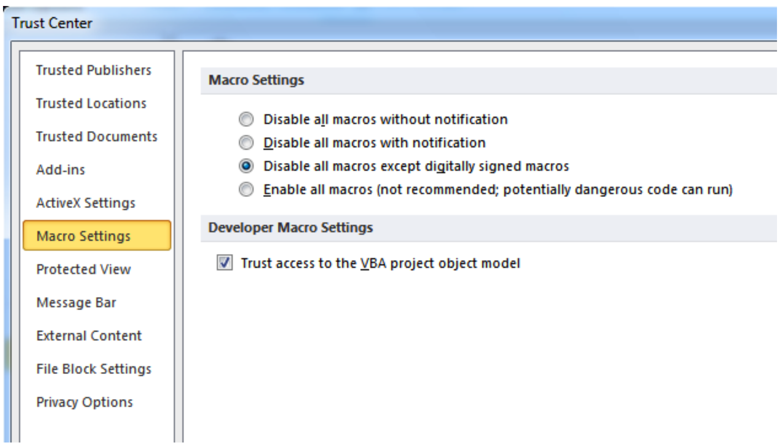
2. Select Trust Center:



3. Select the 'Trust Center Settings…' button on the right side

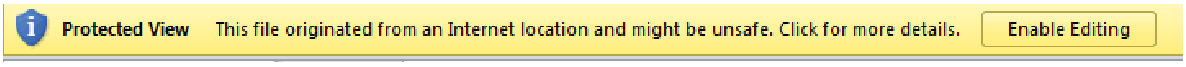


4. Select Macros and ensure that 'Disable all macros except digitally signed macros' is selected:

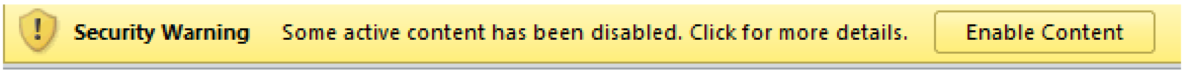


Starting the XTM Offline Editor

On opening the XTM Offline Editor file using Excel you must enable editing:



and enable content:



The exact format of the messages will vary depending on the version of Excel being used.

Icon bar

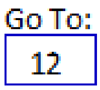
The icons are similar to those in the online XTM Editor:

The floating icon bar provides quick access to key functions:

Icon	Function
	Spell check all target language segments
	Go to previous incomplete segment
	Go to next incomplete segment
	Add a comment (this function is also available from the right button click menu list)
	Go to previous segment with comments
	Go to next segment with comments
	Go to next segment with errors
	Invoke the Find and Replace dialog box
	Invoke the Setup dialog box to switch on or off auto spell checking of target segments and to show all terminology and matching comments
	Show this help

The Go To field

The ‘Go To’ field at in the header section allows you to go straight to the selected segment ID:



Keyboard shortcuts

The XTM Offline Editor keyboard shortcuts are different from the online XTM Editor

Keystroke	Function
Tab	Saves the current segment and moves to the next segment.
Shitf+Tab	Moves to the previous segment.
Return	Saves the current segment moves to the next segment and copies the first match, if any, to the target field of the next segment.
Escape	Undoes any editing in the current segment and moves to the next segment
F1	Open this Help document
Control+x	Cut
Control+c,	Copy
Control+v,	Paste
Control+f	Opens the Find and Replace dialog window
Control+g	Opens the Go To Segment dialog window
Control+m	Add a translation comment to this segment
Control+o	Concordance
Control+p	Print
Control+t	Copies the source text to the target segment.
Control+End	Go to the last segment
Control+Home	Go to the first segment
Control+Up arrow	Go to the previous incomplete segment
Control+Down arrow	Go to the next incomplete segment
Control+,	Go to the previous segment with a translation comment
Control+.	Go to the next segment with a translation comment
Control+\	Concordance
Control+e	Go to the next segment with errors
Control+0…9	Inserts the appropriate inline element e.g. Control+1 = **{1}**, Control+0 = **{10}** etc
Control+Space	Inserts a hard space character, e.g. {sp}

Using the mouse

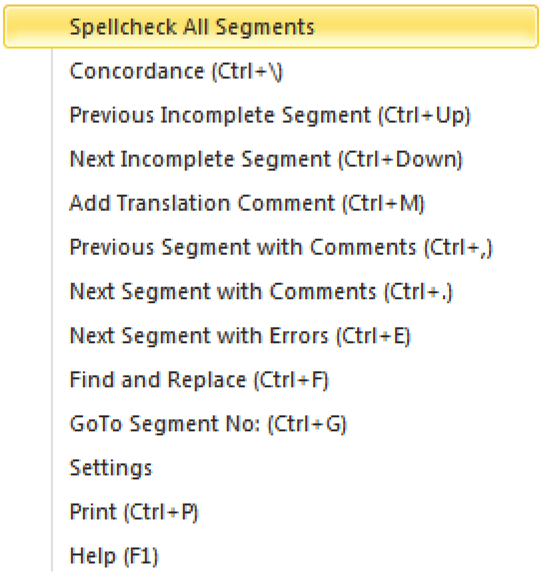
Clicking the mouse on the following areas has the following effect:

Clicking on	Function

Target segment	Opens the segment to reveal any inline element details, terminology and matching. Places the cursor in the target segment text and selects the whole of the text. Use the Tab or Return keys to move to the next segment.
Source segment	Copies the source text to the target segment
Any term	Replaces the source term with the target term within the target segment.
Any match	Copies the match to the target segment

Using the mouse right button click

Clicking the mouse right button while editing a segment has no effect. Clicking the mouse right button outside of the target cell will bring up the following menu:



These menu items are the same as for the icon bar with the addition of the 'GoTo Segment No:', Concordance and Print options.

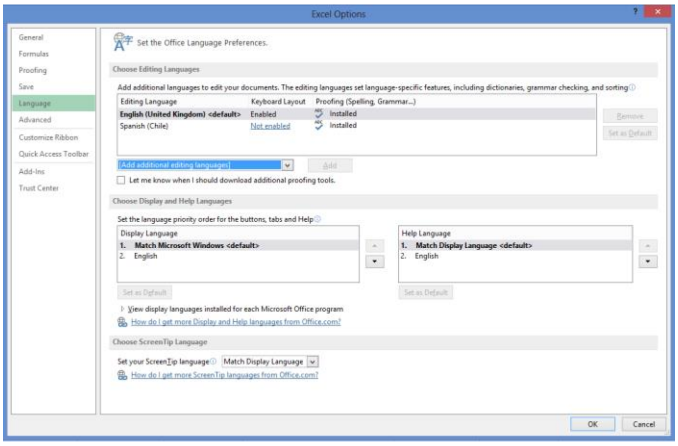
Printing

To print the page use the Control+P keyboard shortcut to bring up the standard print dialogue box. XTM Off Line Editor will automatically set the Print range to All and Print what to Selection. You can choose the printer and set the number of copies.

Spell Checking

The spellchecking uses the built-in Microsoft spell checker. To spell check all the target segments click the  icon.

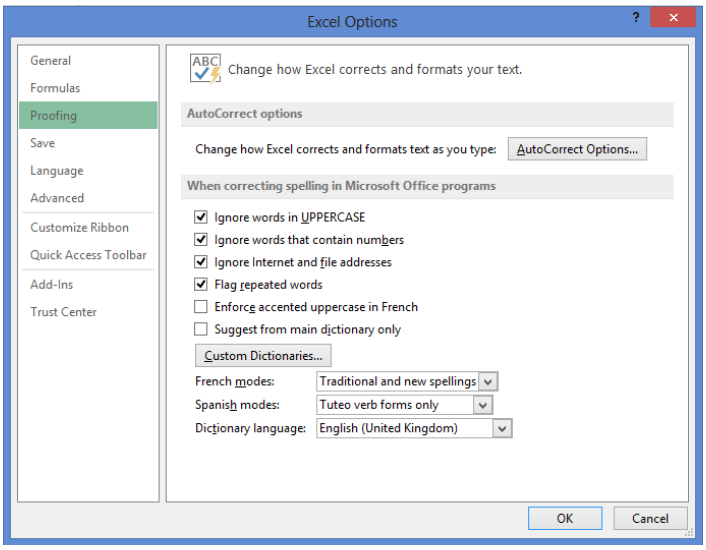
Before running a spell check ensure that the project target language is set as the default editing language. To do this within Excel go to File-> Options->Language:



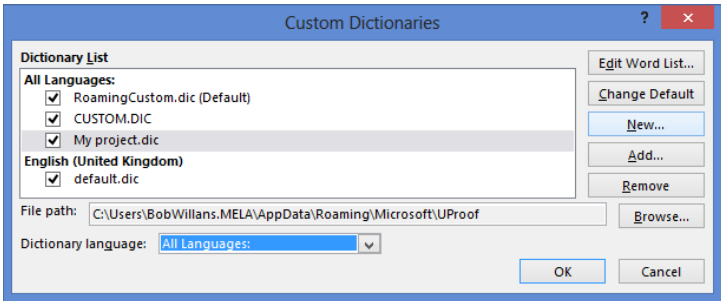
When spell checking the whole project, the ‘Ignore All’ option only applies to the current segment. If you wish to ignore specific words for the whole of file then add them to a custom dictionary.

To do this select Options in the spelling box:

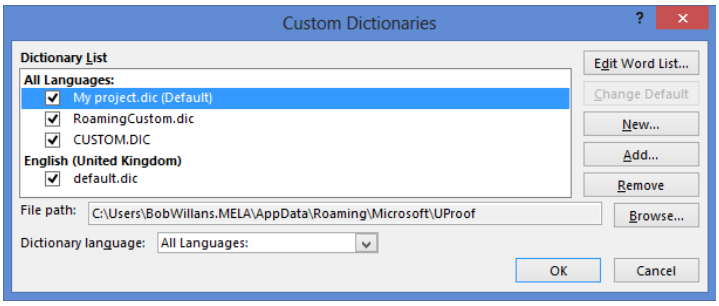
And then click on Custom Dictionaries:



And create a new custom dictionary for the project:



Finally make it the default custom dictionary:

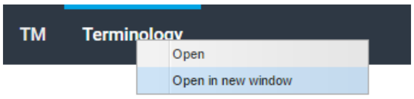


7. XTM Terminology

General description

XTM incorporates a comprehensive terminology module. This is a database of your terms which includes a concept, definition, context, image, multilingual translations, and remarks. In XTM Editor, the system identifies and highlights terms in the source text that are in the term base. Approved translations for terms recognized in the active segment are displayed in the docked panel. When mouse over, more term details are displayed. This feature facilitates a consistent use of the agreed terminology during translation. Users can import and export the terminology in XTM and edit or add new terms directly from XTM Editor. You can also add custom tags to terms for a more detailed categorization and display related terms.

For easy access it is possible to open Terminology in a separate window. You can do this by right clicking on the tab and selecting “Open in new window” from the context menu.



Right clicking on the Terminology tab

The Manage tab is where you can find, add, modify or delete concepts or terms from a customer’s termbase. You can browse, filter or search for terms to update them and edit them as required.

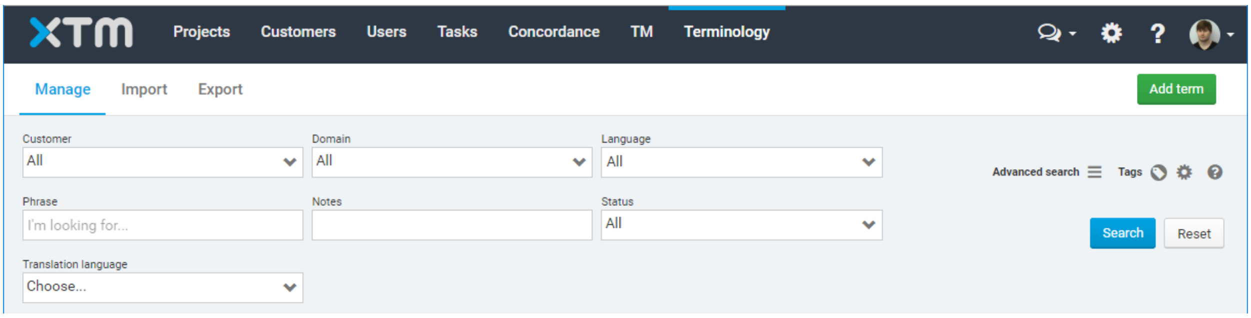
The Import tab enables you to create, update or synchronize termbases by importing terminology lists from external sources. The file formats that can be imported are XLS, XSLX, TBX and MTF. XTM stores a history of terminology imports so that you will have a record to track changes to your termbase.

The Export tab is where you can download terminology lists to several standard file formats, XLS, XLSX, TBX and MTF, for review or exchange. XTM stores a complete export history so that you will have a record to track changes to your termbase.

Searching for terms

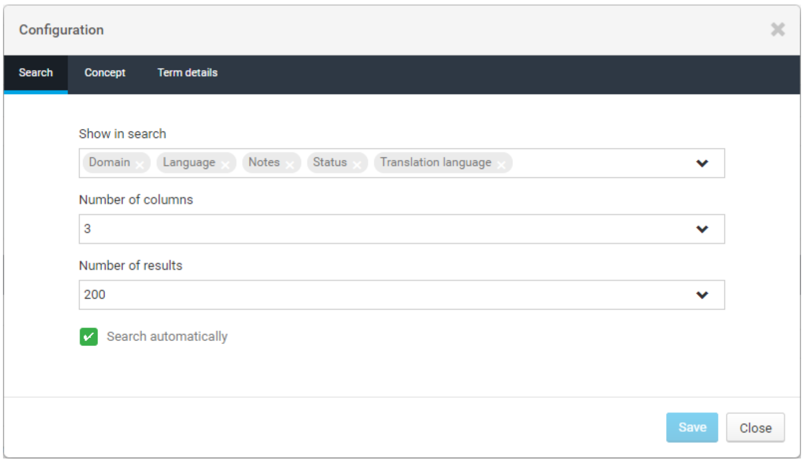
You can find and view a set of terms by selecting values in the Search area at the top of the window. You may narrow the search by entering one or more customers, languages and other configurable field values or enter a specific text string to search for in the Phrase field.

Terms that match your search criteria are displayed in the search results list box on the left side of the screen. You can export the search results directly from the Manage tab by clicking the export button above the term list.



Searching for a term in XTM Terminology Manager

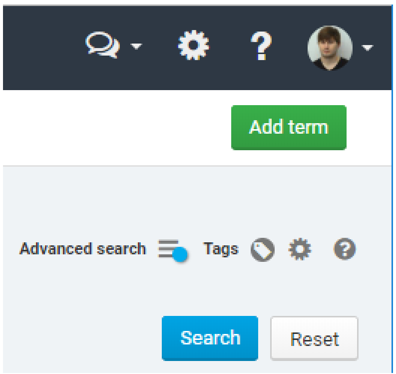
Fields available in the standard search and their layout can be controlled using terminology configuration. There, you can choose additional search criteria, such as who it was created by (Created by), when it was created (Created at), who it was modified by (Modified by), when it was modified (Modified at), whether it has suggestions, or search by notes or the id of a concept or a term. Also, the number of columns in which the fields are arranged can be selected, the number of results displayed on a single search results page can be changed or the automatic search can be disabled.



Terminology search configuration

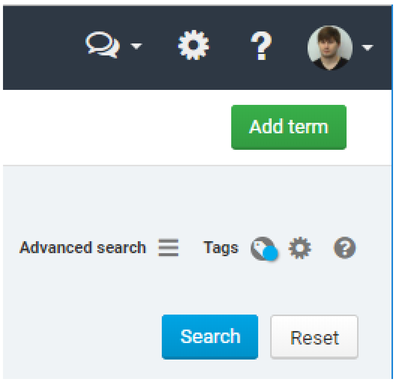
Advanced search

To find terms using more sophisticated search criteria, open the Advanced search and fill in the fields as required. A blue dot indicates that some advanced search conditions are applied to the standard search.



A blue dot denoting that advanced search criteria are applied

In addition to the standard and advanced search criteria, terms can be filtered by tags. The list of available tag filters depends on tags created under Configuration > Data > Tags > Tags. A blue dot indicates that some tag filters are applied to the standard search.



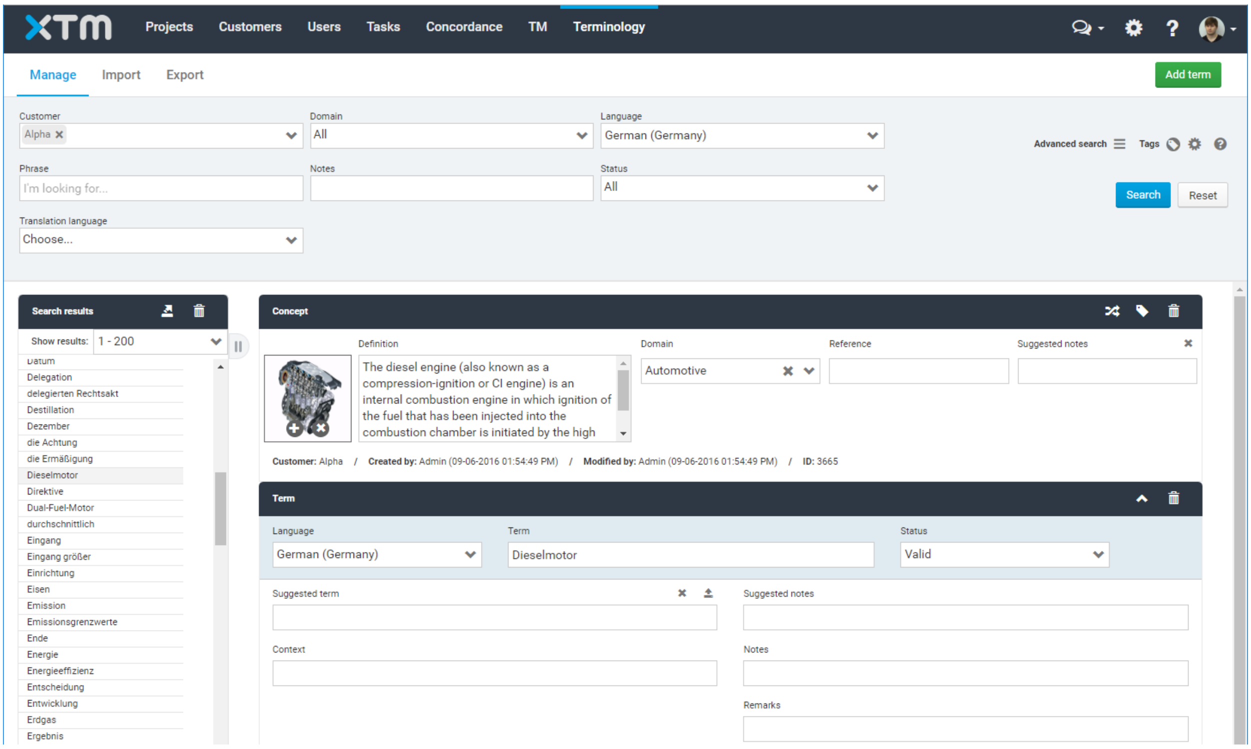
A blue dot denoting that tag filters are applied

Using tags

You can further categorize your terminology by assigning to concepts, tags that have been previously set up in Configuration > Data > Tags settings. Click on the tag icon next to the concept and select from the available tag groups and tags in the dialog to assign tags to the concept. Tags can also be assigned to concepts in a batch when selected during import of a terminology list or used as criteria for searching term bases. You can delete tags from concepts by clicking on the X next to the tag that is displayed at the bottom of the concept details.

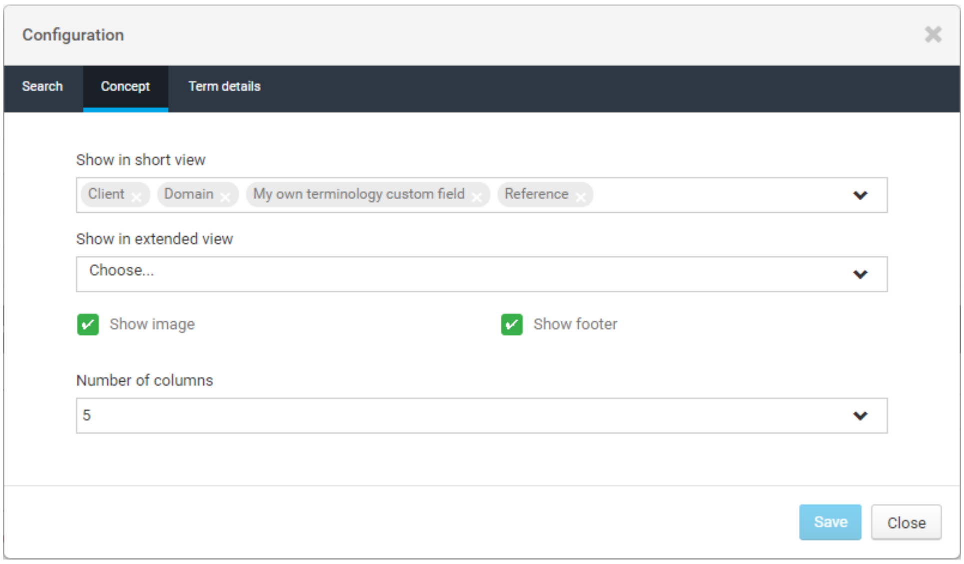
Displaying terms

Clicking on a term in the list displays its concept, meta data and translations on the right-hand side.



Viewing a term in the Terminology Manager

Similar to the standard search, Concept and Term details views can be customized using terminology configuration. This provides control to select fields visible in the short and extended views, options to show the concept image or the footer, and to change the number of columns in which the fields are arranged.



Term concept display options

The selected fields together with the added information will be made available to linguists working in the XTM Editor with the exception of the Note field that is meant for notes to terms visible only in the Terminology module.

Any active custom Terminology fields created in the Configuration tab will be available for choice from the dropdown list below the option Show in extended view.

Adding terms

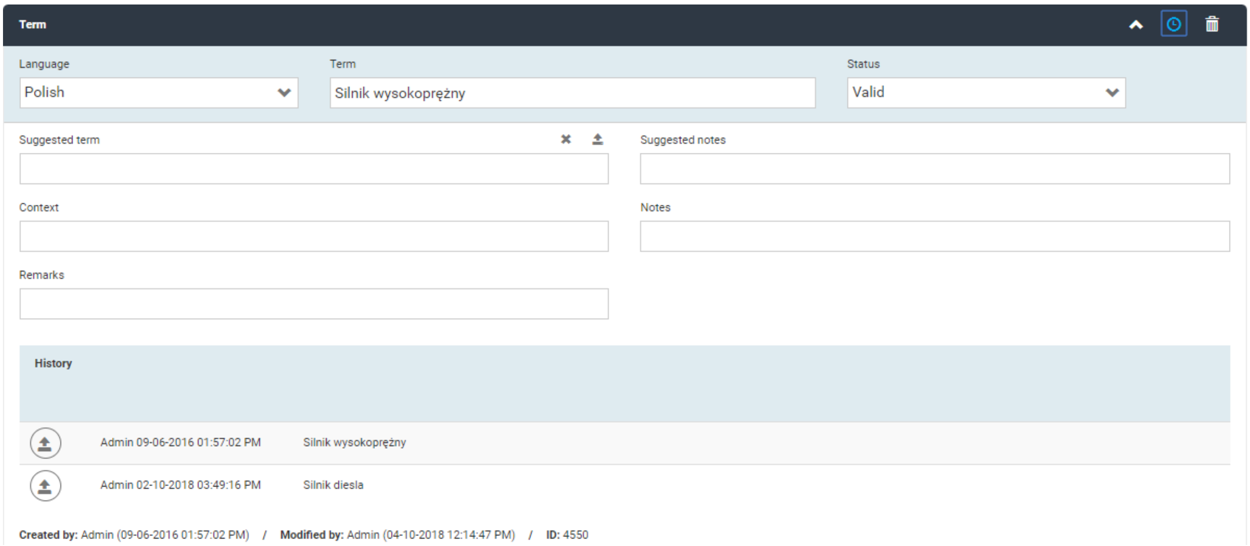
You can add a term in the Manage tab by clicking Add term in the top right corner of the window. Enter the details of the term, its translations, the approval status, and then click Save. Additional translations can be added to an existing term by clicking on the Add new translation button and then clicking Save.

Also, a picture can be uploaded to a term concept to illustrate it. Pictures can be added in the jpg, jpeg, bmp, png or gif file format. The maximum file size is 25 MB. High resolution pictures will be downscaled to the maximum supported picture resolution of 600 × 600 px.

Terms can also be added directly from within XTM Editor. Select the desired term in XTM Editor, right click on it to bring up the context menu and select one of the Terminology options: “Add term – quick” to add the term with minimal information, “Add term – full” to add more term details, or “Open terminology” to open the full terminology manager window.

Editing terms

You can edit terms either from the Manage tab or directly from within XTM Editor. In the Manage tab search for the term you want to change, and select it. Make the change and click save. To see the history of changes, click the clock icon . You can restore a previous version of a term by selecting it and clicking the restore icon.



The history of a term

Approving terms

Users with Update and Approve terminology privileges can approve terms suggested by linguists during translation. You can approve terms by searching on the Manage tab for Not approved terms and changing the terms' status to Valid. When specific terms are undesired in the translation, you can set their status to Forbidden or Rejected. These terms will be displayed in red in XTM Editor.

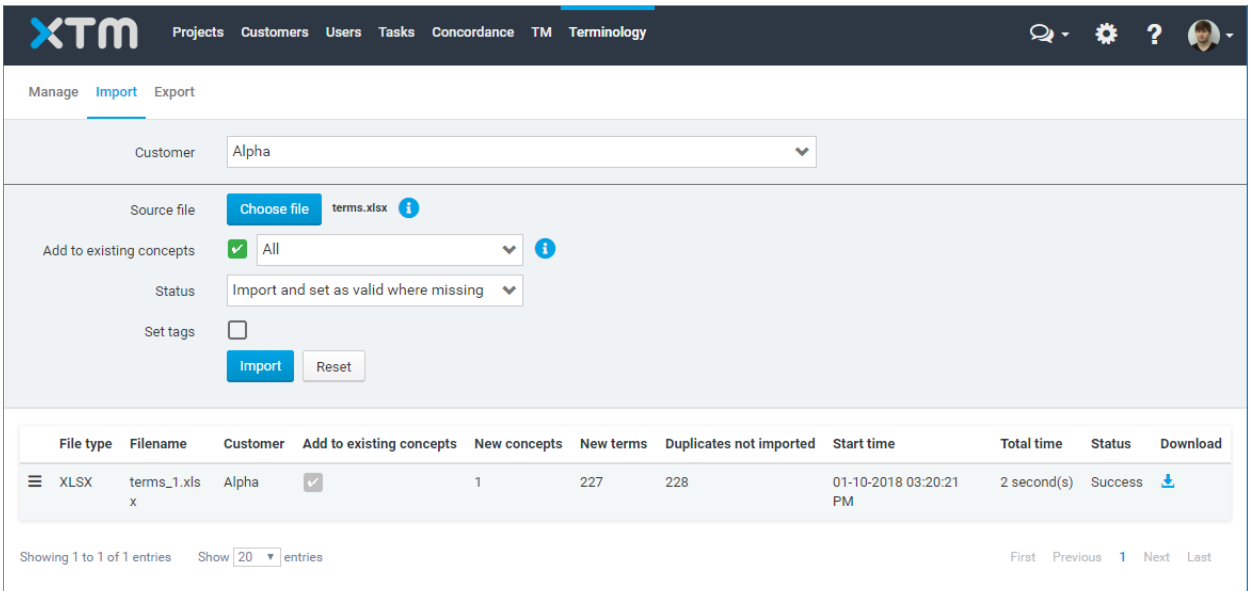
Deleting terms

In the Manage tab you can delete individual language translations of a term by clicking on the trash can icon to the right of the translation details. You can also delete the concept with the associated term and all of its translations by clicking the trash can icon to the right of the concept details and clicking "Yes" in the confirmation dialog.

All found terms can be deleted in one go by clicking the trash icon in the term search results section.

Importing terms

On the Import tab you can select a customer and import one of several standard file formats, XLS, XLSX, TBX or MTF, to create or update a customer term base.

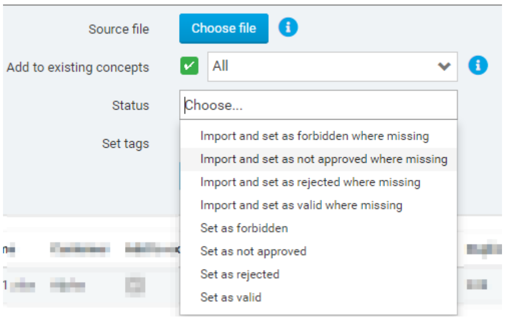


Terminology > Import screen

Columns with terminology translations should have UTF-8 language code headers. The list of UTF-8 language codes supported by XTM is available in Appendix 2 of the XTM Manual. The import file has to contain at least a list of terms and their translations. Other term fields are optional.

It is possible to set terms statuses at the import. In such case a “status” column has to be included in the import file with one of the following statuses: VALID, REJECTED, FORBIDDEN or NOT_APPROVED. Date format supported in the import is the following: yyy-mm-dd hh:mm:ss. Pictures to term concepts are an exception and cannot be imported.

You can choose to add duplicate terms to existing concepts in a term base rather than creating new concepts from them by clicking the “Add to existing concepts” checkbox and selecting the language to analyse for duplicates.



Terminology import status options

You can set the status for all imported terms. If terms in the import file include statuses, the statuses can be imported. It is possible to specify the status that will be set to terms without a valid status in the import file. Also, terminology lists to be imported can be tagged during the import to improve terminology categorization.

Add to existing concepts

All terms in XTM are linked to a concept and so when you add a translation for a term it is stored in the term base and linked to the concept.

When you import terms if you do not select “Add to existing terms” a new concept will be created for each row of terms irrespective of whether one or more of the terms already exist in the term base.

If you check “Add to existing concepts”, a new dropdown field will be displayed with a list of languages. By default, this is set to “all”. If you use this default setting XTM will compare all the terms to be imported with all the existing terms and if it finds that a term already exists, then it will not be imported and the remaining terms in the row will be linked to the existing concept preventing concept and term duplication.

It is not recommended to use this feature when importing terms with more than one meaning. In effect, terms can be linked, and new, incorrect terms can be added to the concept.

One workaround is to select a language from the drop-down box. Then XTM will only check whether the term already exists in the specified language.

To illustrate the above consider the following example:

> You have the following terms in XTM linked to one concept. English: lock – Polish: zamek
>
> Then you try to import English: castle – Polish: zamek
>
> If “Add to existing terms” is checked you will end up with one concept with three linked terms
>
> English: lock - English: castle – Polish: zamek which is clearly wrong.
>
> However, if you select English from the pull-down list “Check for duplicates in the selected

language only" you will end up with two concepts each with two linked terms

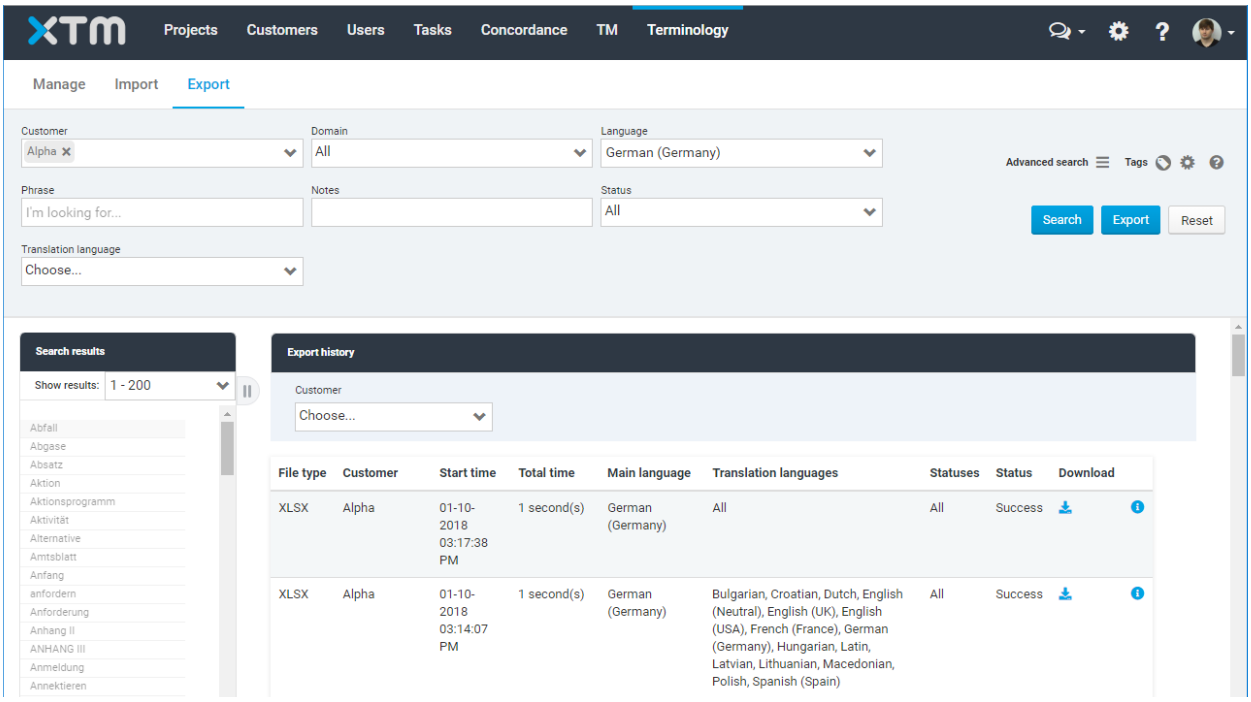
English: lock - Polish: zamek

and

English: castle - Polish: zamek

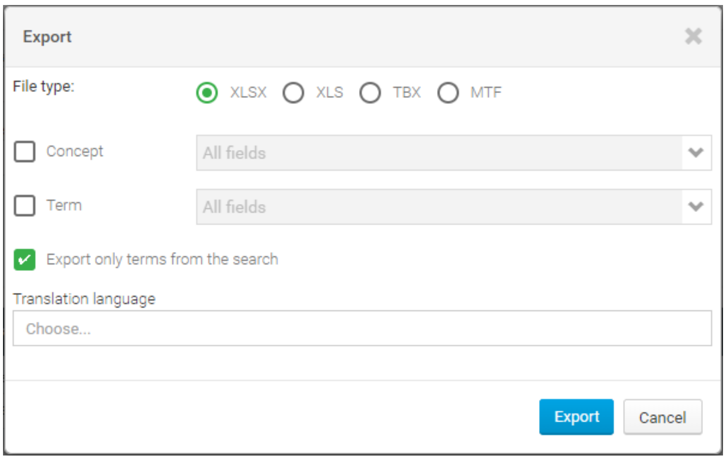
Exporting terms

On the Export tab you can download terminology lists to several standard file formats, XLS, XLSX, TBX and MTF, for review or exchange.



Terminology > Export screen

You can freely configure the data to be included with the terms from among the comprehensive set of fields and tags that XTM offers. In addition, terms can be filtered before the export by choosing a translation language or deciding to export only terms from the search. Pictures to term concepts are an exception and cannot be exported.



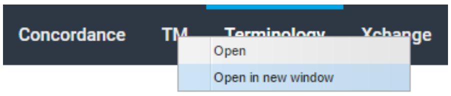
Terminology export options

Terms found using the search can be exported from the Manage tab too using the export button in the search results section. Also, there is a terminology export history that lists export details, and provides an option to download the exported file.

8. XTM TM Manager

The TM Manager window is the place to import, edit and export your translation memory.

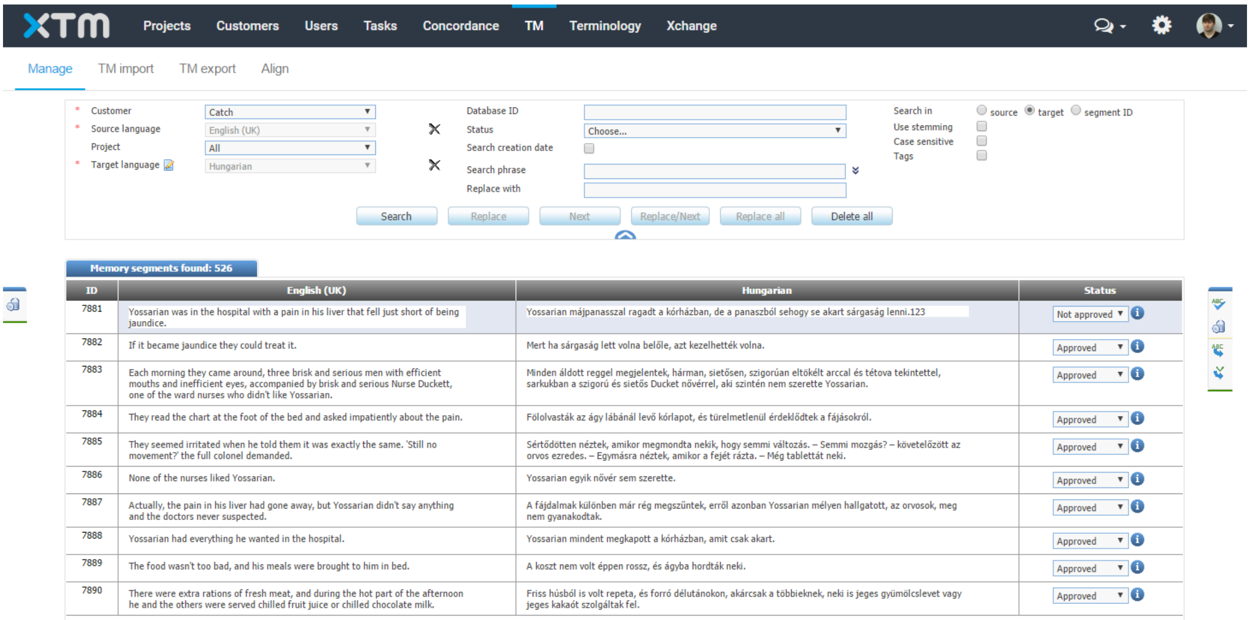
For easy access it is possible to open TM Manager in a separate window. You can do this by right clicking on the tab and selecting “Open in new window” from the context menu.



Right clicking on the Terminology tab

Finding and editing segments in the TM

Click on the TM tab. In this screen you can search for and modify segments, perform quality assurance including the spellchecker and import and export translation memory as either a TMX file or an XLIFF file



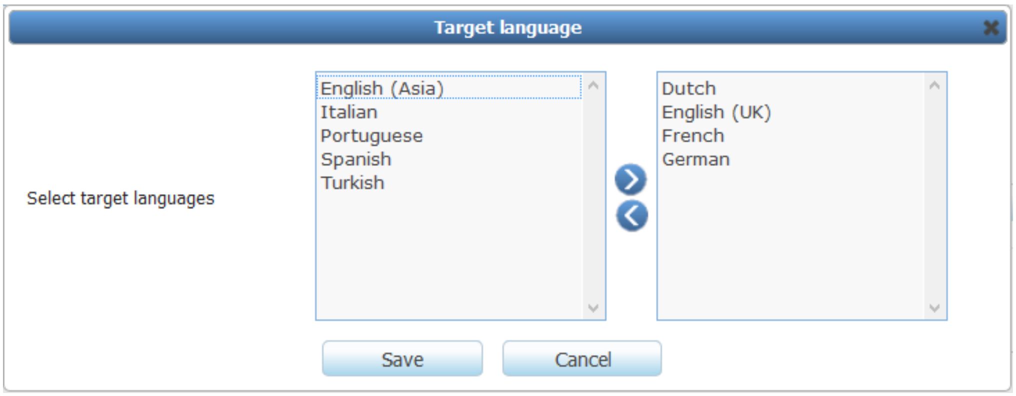
TM Manager

The translation memory is tagged by customer, project and document so it is first necessary to select the customer for whom you wish to run the TM Manager.

Next carry out a search to find the segments that you wish to manage by entering the search criteria and click on the search button.

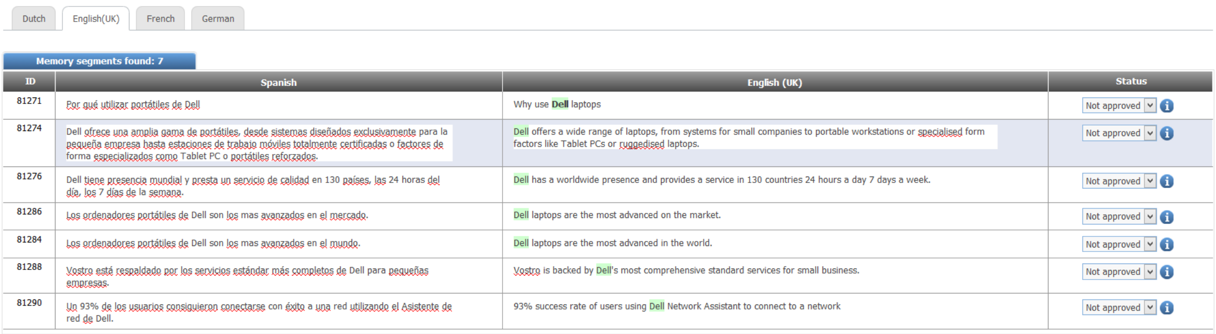
It is possible to search by the following fields: customer, source language, project, target language, one or more segment IDs, status, creation date and phrase. If you enter a search phrase you need to specify whether you are searching in the source or target segment. You can also have the option of using stemming in your search and setting whether you want the search to be case sensitive or not.

You can search for multiple target languages at one time by clicking on the edit icon which brings up the multi- select window



Selecting multiple target languages in TM Manager

When multiple target languages are selected the results are shown in different tabs

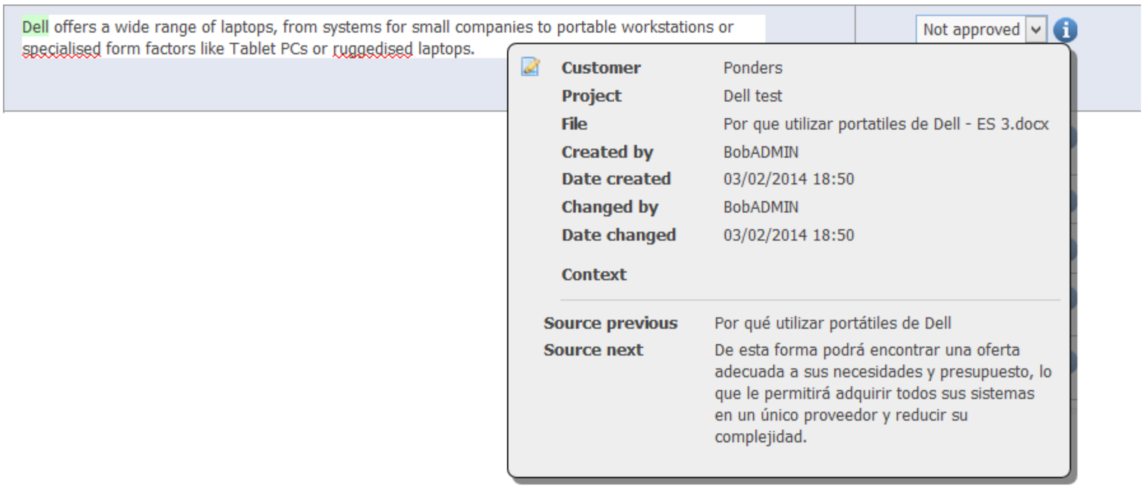


Viewing multiple target languages in TM Manager

The number of segments found and the segments themselves are displayed in the lower half of the screen.

Hovering over the "i" icon displays any meta-data stored with the segment including:

- Customer
- Project
- File name
- Created by
- The date created
- Modified by
- The date modified
- Tags associated with the segment
- The context of the segment.



Segment metadata pop-up in TM Manager

Once you have found the desired segments you can edit either the source or target phrase manually, change the segment status or use the find and replace feature. To use find and replace enter the word or words to be changed in the “Search phrase” field and the word or words to replace them in the “replace with” field. Then use a combination of replace and next buttons or the replace/next button to work through the segments. If you want to replace all the segments in one go without checking them further, click the “Replace all” button. XTM will display a message to say how many segments have been changed.

If you wish to delete all the found segments click the “Delete all” button.

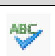
Left hand tool bar

The left hand tool bar relates to all the segments displayed on the current page.

Icon	Action
	Delete all segments on this page

Right hand tool bar

The right hand tool bar relates to individual segments.

Icon	Action
	Performs QA check on current segment
	Delete current segment
	QA current segment
	Revert to original status

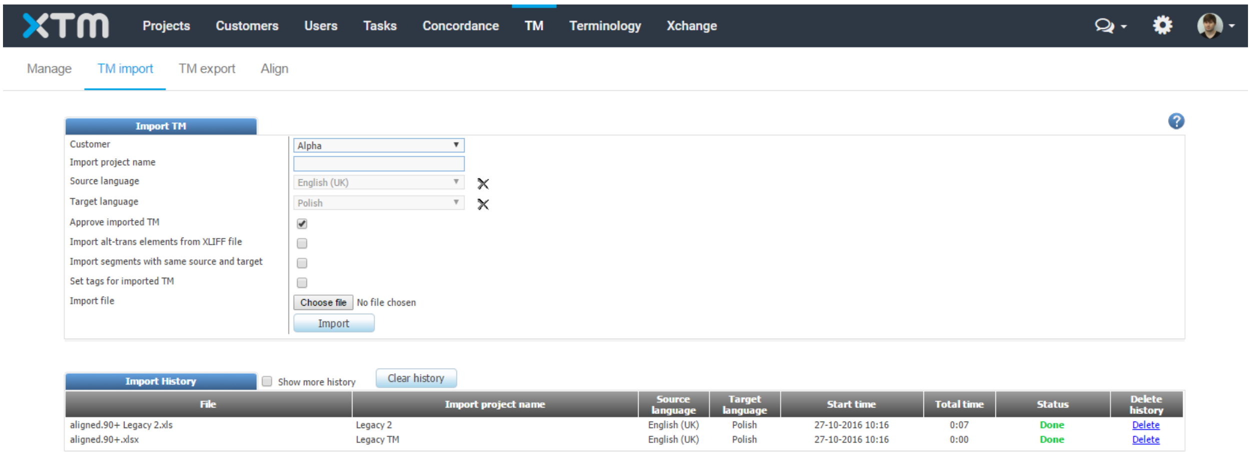
Importing a translation memory

Translation memories can be imported into XTM from a TMX, XLIFF or Excel file. For best results we recommend using the TMX v 4b format.

To import either a TMX, XLIFF or Excel file into XTM click on the TM import tab and perform the following steps:

- Select the customer name from the pull down list
- Give the import project a name.
- Set the source and target languages
- Check the box to set the status of the imported TM
- If you are importing an XLIFF file, check the box labelled “Import alt-trans elements from XLIFF file” if you wish to import the matching data that is stored in your XLIFF file.
- Set if you want to import duplicate records
- Set the tags for the TM you are importing
- Click on the browse button to locate the file you wish to import
- Click the import button.

A new record in the import history section is created that displays the status of the import. The status changes from “in progress” to “done” when the import is complete.



The TM Import Window

When importing a TMX file with tags the proper syntax for a tag group and a tag is for example:

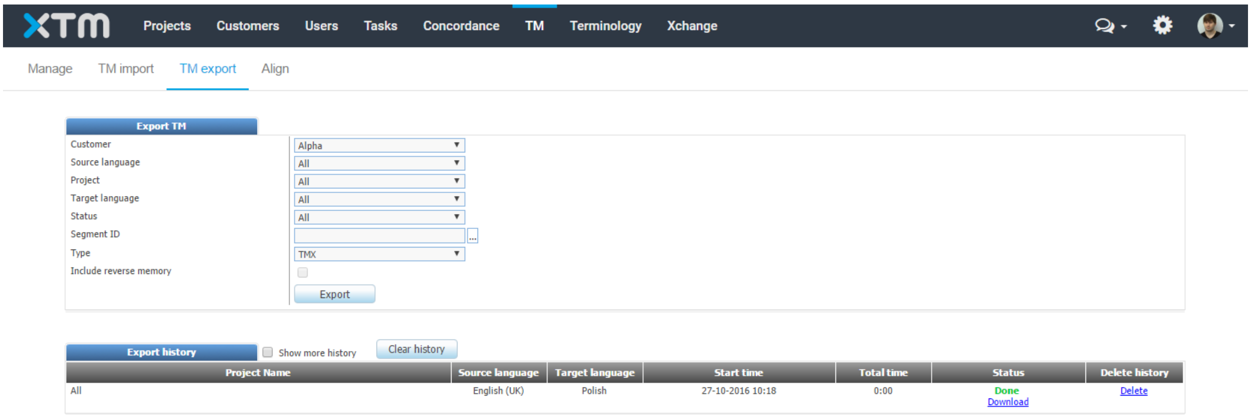
<prop type="Domain">Therapies</prop>

Where "Domain" is a tag group and 'Therapies' is the tag name.

The tag groups and tags need to be created in XTM before the importing the TMX file. The names of the tag group and the tag may only contain letters from the English alphabet, numbers, dash and underscore.

Exporting a translation memory

To export a translation memory click on the TM export tab. You have the option of exporting all your TM or you may choose a sub set based on the source language, project, target language and status. You can also choose to filter the export by specifying the segment IDs. Choose whether the export file type should be TMX, Excel or single language XLIFF and then click the Export button. The file is downloaded as a .ZIP. A history of the exports is displayed below.



The TM Export Window

Exporting translation units based on their source file segment IDs

Click on three dots next to the Segment ID input field to open a multiple Segment ID selection window.

The multiple Segment ID selection window

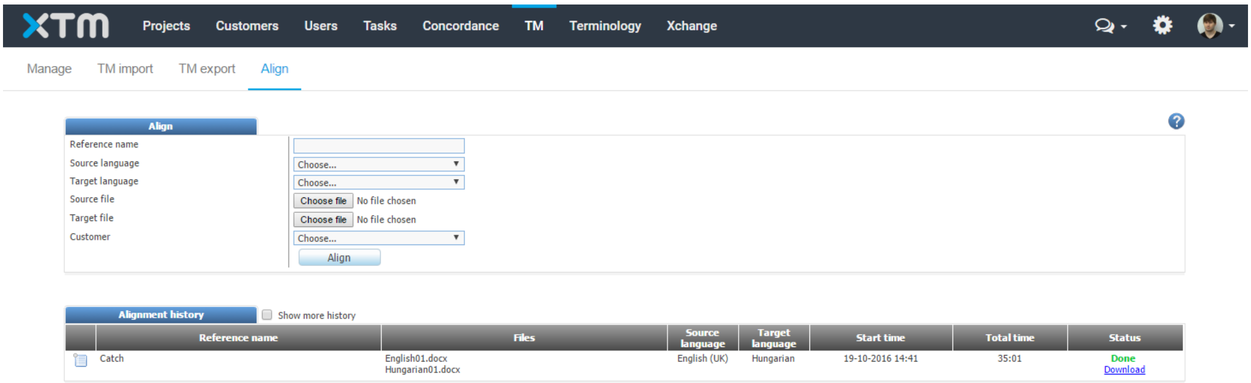
Type or paste multiple source file segment IDs to the Segment ID window. Make sure to enter only one segment ID per line.

XTM Align

With XTM Align you can quickly and easily create bitexts from your previously translated documents. The bitext contains a source document and its translation aligned at the segment level. The bitext can then be uploaded as translation memory into XTM for use in future projects.

Aligning documents

To align documents enter information in the reference name and set the source and target languages. Upload the source and target files and optionally enter the customer name, then click the Align button. The process of alignment may take some time depending on the size of the documents and whether or not bilingual dictionaries already exist in XTM or have to generated by the system. When the alignment is complete the status will change to Done and the Download button will become visible in the alignment history section. Clicking on this link downloads the Excel file containing the aligned text.



The alignment window

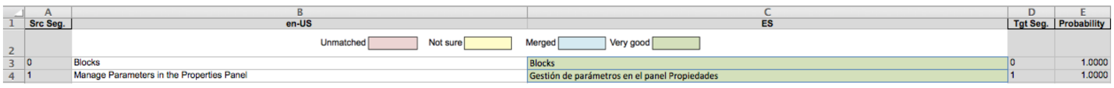
XTM Align creates two Excel spreadsheets for each alignment:

- One with '90+' added to the name of the file contains only segments with a 90%+ probability of accurate alignment. This spread sheet can be used to quickly check and upload the memory, as it requires only visual confirmation of the alignment without any further work.
- The main spread sheet contains the full alignment details: individual cells can be deleted and target text modified to reflect source text segmentation.

In the spreadsheet the source segments cannot be changed: they cannot be merged or modified in any way as they represent the way in which the source text has been segmented. The target segments can be modified to reflect the source segmentation if required, e.g. text from multiple cells can be merged into one corresponding cell.

Excel file description

The output of XTM Align is an Excel file:



The Excel file showing aligned text

The columns in the Excel file are as follows:

Column	Title	Contents
A	Src. Seg	The source segment numbers
B	Source language code	The source segment text
C	Target language code	The target segment text
D	Tgt. Seg	The target segment number
E	Probability	The probability score for the match on a scale from 0 to 1, where 0 indicates zero probability and 1 indicates an absolutely accurate probability

In addition cells are given a coloured background to reflect matching accuracy:

Colour	Matching accuracy
	Unmatched cells in either source or target
	Uncertainty as to the quality of the match
	Text from multiple segments has had to be merged into one cell
	A very good match
	A good match

In all cases the alignment of the segments must be checked by a project manager or linguist prior to uploading the spread sheet into XTM.

Correcting the alignment in Microsoft Excel

The rules regarding the correction of alignment in the spreadsheet are:

1. When deleting cells in either the source or target columns you must always choose to ‘Shift cells up’.
2. You can only split or merge text in target cells.

Target language cell text can be split into multiple cells if required to reflect the translation of the source segments, e.g. target cell text that represents two or more source segments may be ‘retranslated’ to reflect the source segmentation. Text in multiple target cells can also be merged into one cell if required.

Source text can never be modified.

Uploading the TM into XTM

After you have completed the review and correction process in the spreadsheet, you can upload the TM into XTM via the TM tab using the TM Import upload option. The spreadsheet can be uploaded as is into XTM.

The following rules apply to empty source or target cells:

1. A source segment with no matching text in the corresponding target cell will not be uploaded
2. A target segment with no matching text in the corresponding source segment will not be uploaded
3. Empty source and corresponding empty target cells will not be uploaded

9. XTM apps for iOS/Android

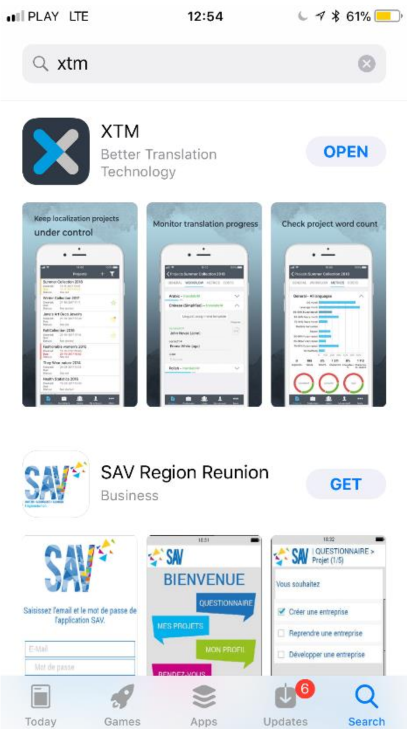
Prerequisites

You need iOS 9.0 or Android 4.2 or later installed on your mobile device to run the XTM app.

Installation on iPhones and iPads

Open the App Store on your iPhone or iPad. Type “XTM” in the search field and touch the Search button. Find the XTM app on the list of results. You will recognize it by the silver-blue “X” icon and the information that it was developed by XTM International.

Touch the installation icon. The XTM app icon will be added to your apps.



The XTM app in App Store

Installation on Android devices

Open the Google Play store on your Android device. Type “XTM” in the search text input field and touch the Search button. Find the XTM app on the list of results. You will recognize it by the silver-blue “X” icon and the information underneath that it was developed by XTM International.

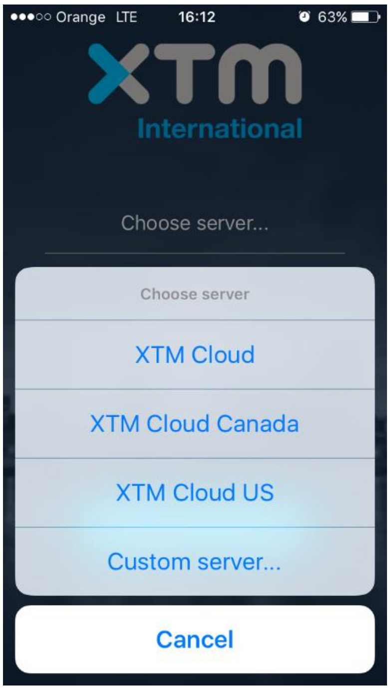
The XTM app in Play Store

Touch it. When a screen with the details of the XTM app opens, touch the INSTALL option. A prompt will pop-up informing that XTM needs access to: Phone and Device ID & call information. Touch the ACCEPT button. The XTM app will start installing on your mobile device. When the installation is finished, the INSTALL button will change to the UNISTALL and OPEN buttons. The XTM app icon will be added to your home screen and to the apps menu.

Running the XTM app for the first time

You will be asked to choose a server and log in using your existing credentials, when you run the XTM app for the first time:

- If your XTM account is set up in the standard XTM Cloud and on your computer you log in to XTM at https://www.xtm-cloud.com/ then select XTM Cloud from the Choose server dropdown list.
- If your XTM account is set up in the US XTM Cloud and on your computer you log in to XTM at https://www.us.xtm-cloud.com/ then select XTM Cloud US from the Choose server dropdown list.
- If your XTM account is set up in the Canadian XTM Cloud and on your computer you log in to XTM at https://www.ca.xtm-cloud.com/ then select XTM Cloud Canada from the Choose server dropdown list.
- If your XTM account is set up in a private cloud or XTM Suite, select the Custom server… option from the Choose server… dropdown list. Then enter the same URL to your XTM instance that you use on your computer.

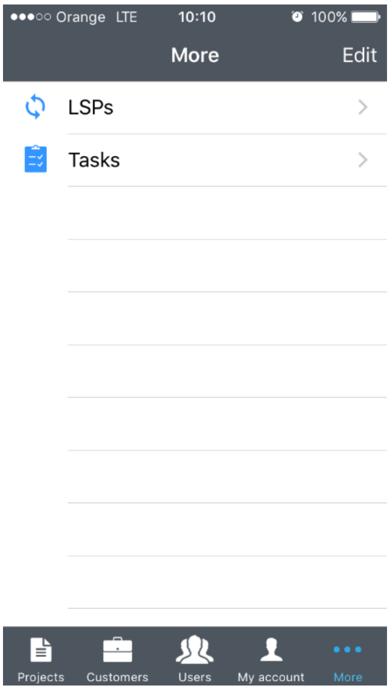


Choosing the server to log in

Enter the company name, username and password and touch the LOGIN button. You will be asked to choose a new PIN code before you can move to the app. When the open XTM app has not been used for longer than 5 minutes, then you will have to enter the PIN code to unlock it. When your device is equipped with a fingerprint reader you can use it to unlock XTM app instead of the PIN code.

Navigation

The navigation menu is placed at the bottom of the screen. The XTM app provides access to your Projects, Customers, Users and My Account information with LSPs and Tasks available under the More icon..



The menu

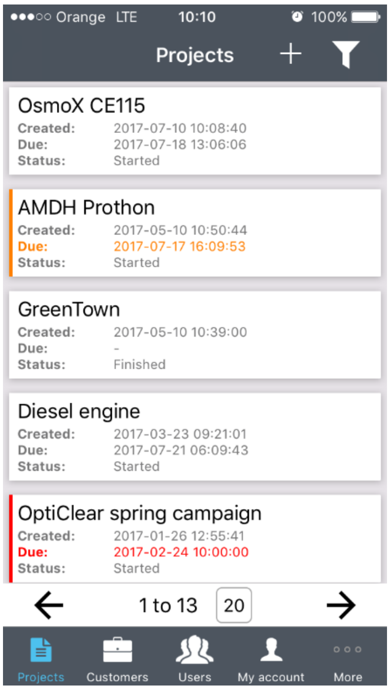
At the bottom of the Projects, Customers and Users screens you can see the number of items displayed on the current page, for example 1 to 6. Touch the square button with a number to change the number of items displayed on a single page and the left and right arrows on the bottom of the screen to move between the pages.

Projects

Project listing

The Projects screen lists the same projects you can see when you log in to XTM on your computer. The list of projects provides the following information:

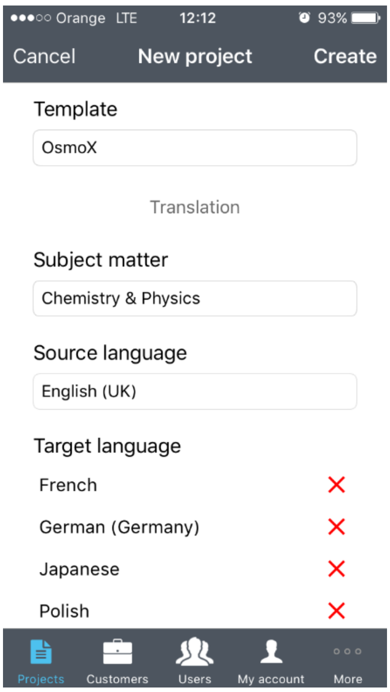
- Project name.
- Time created.
- Time due:
  - the "-" symbol in the Due field means that no due date is set for the project.
  - When there is more than 24h remaining before the time due, the project looks normal.
  - When there is less than 24h remaining before the time due, there is an orange vertical strip on the left edge of the project item. The time due is displayed in orange as well.
  - When a project is overdue, there is a red vertical strip on the left edge of the project item. The time due is displayed in red as well.
- Project status. Projects can have the following statuses in the XTM apps: Not started, Partially Started, Started, Finished, Archived or Auto-archived. When a project is Archived or Auto-archived, it is greyed out on the project list.



A list of projects

Creating a new project

You can create new translation projects directly from your mobile device. Click the + icon at the top of the screen to start creating a new project. Select a customer, then provide at least the project name, source language, target languages and the workflow. You can enter optional data as well or use a template to populate the settings. Then touch Create in the top right corner of the screen. The created project will be available in both the XTM app and when accessed from a desktop browser. If the offline mode activates during new project creation, the progress will be saved. The project creation can be resumed by touching the “+” add project icon, once the Internet connection has been restored.

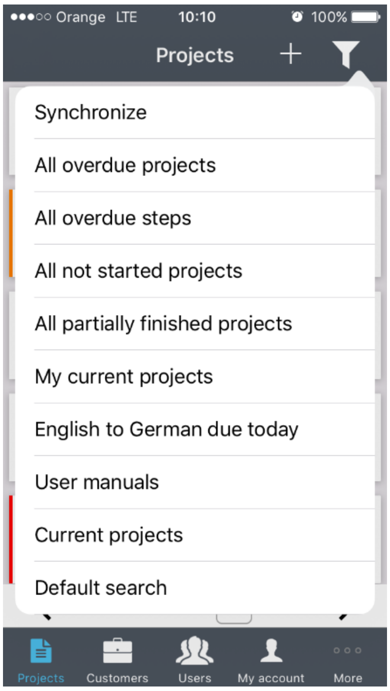


Creating a new project in the XTM app

Smart filters

There is a filter icon in the top right corner of the screen. Touch it to display the menu of Smart filters. They are the same standard and custom filters that are configured in the desktop version of XTM. When you apply any of the filters, you can return to the initial project listing screen by touching the Smart filters icon again and selecting the Default search.

If you have added or edited Smart filters via your PC, you can refresh the filter list on the XTM app by opening the Smart filter menu and touching Synchronize.



Smart filters

Project Details

Touch a project on the project listing to go the Project Details screen. The Project Details screen consists of two tabs:

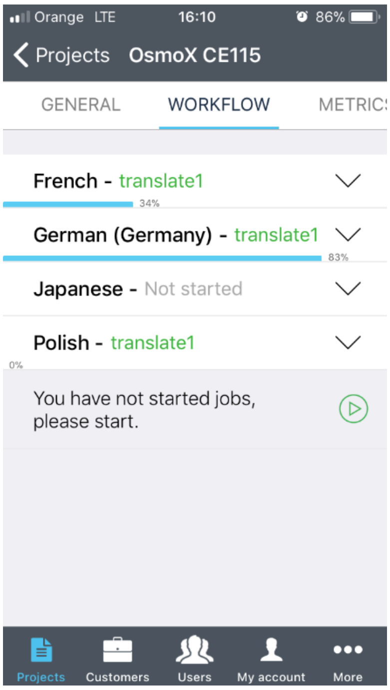
- General info
- Workflow
- Metrics

General info

The General info tab contains basic project information including the project name, reference ID, description, customer, project manager, source language, target languages, subject matter, who created it, when, and what is the deadline.

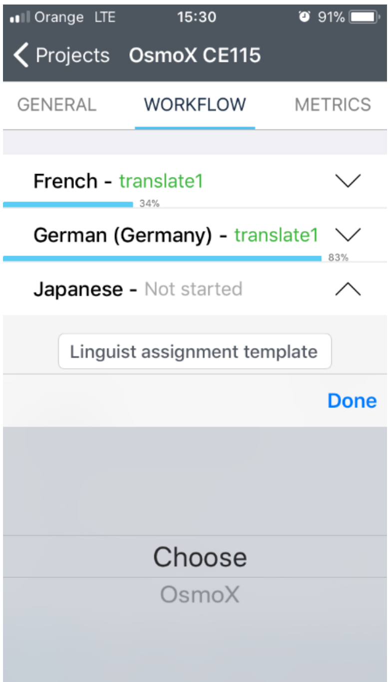
Workflow

The workflow tab shows the list of target languages together with the active workflow step or information that the workflow has been finished for the language. Touch a language to expand its workflow and assignments. The blue bar below each language represents the translation progress. If there is an assignment missing, you can either select a linguist for that workflow step or use a template to fill in the missing assignments for all workflow steps in the language or to overwrite the existing assignments.



Project target languages and active workflow steps

When there is at least one language with a workflow that has not been started, the following message displays "You have not started jobs, please start". Ensure there are linguists assigned to the first workflow step in each language and touch the green arrow to start project workflows.

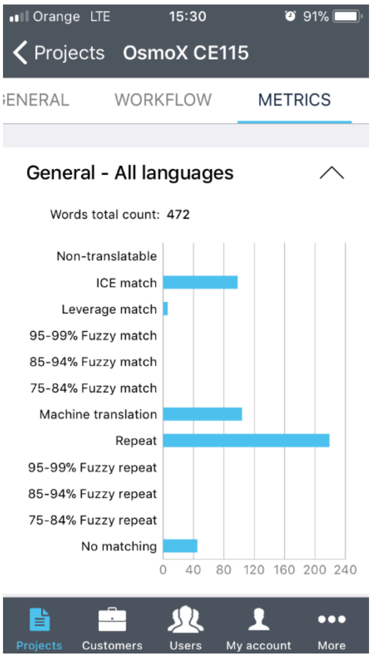


Assigning linguist from a template

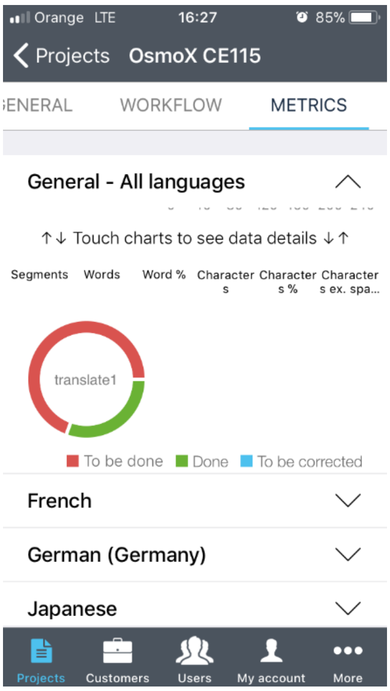
Currently active workflow steps have a green border around the workflow step assignment and the workflow step name, such as translate1 or correct1 etc. is displayed in green. You can still change assignments to currently active workflow steps.

Metrics

Metrics provide information about the number of segments, words, characters and the percentage of words or characters already translated or to translate in the project.



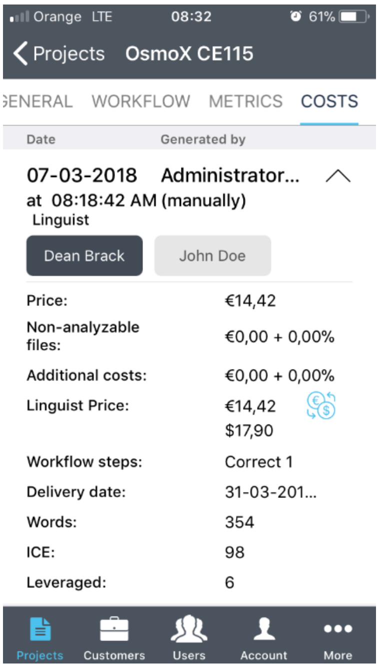
Project metrics – Word count



Project metrics – Pie chart

Costs

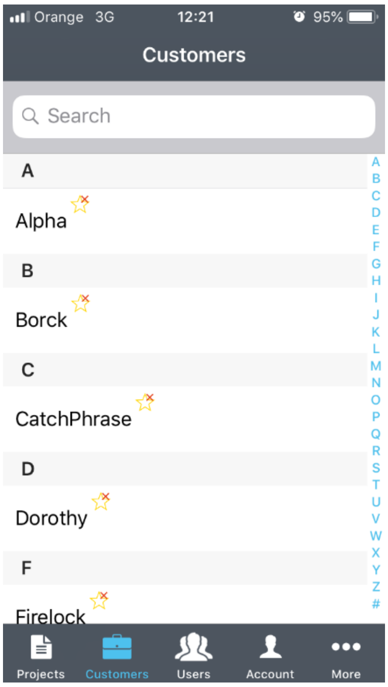
The costs tab provides information about the anticipated costs of a project. It is the value calculated in XTM on the project's Estimates tab, in the Costs section. Similar to the desktop version of XTM, costs are arranged in records that can be expanded for details. They are divided per linguist and displayed in your default currency. Costs can be converted into other currencies after touching the convert currency icon.



Projects > Costs

Customers

The Customers screen lists your active customers and customers without an assigned project manager. When there is no project manager assigned to a customer, you can see the icon to the right.

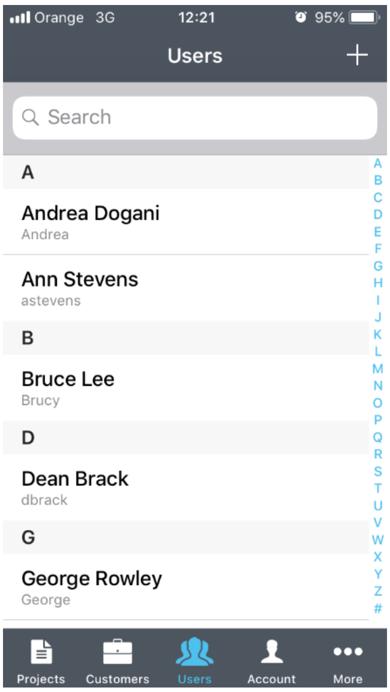


The list of customers in the XTM mobile app

Touch a customer from the list to display their details including address, phone and VAT number. You can call a customer directly from the app when they have at least one phone number set. When they have more phone numbers available, you can select which one to call. When the customer has a mobile you can also send a text message.

Users

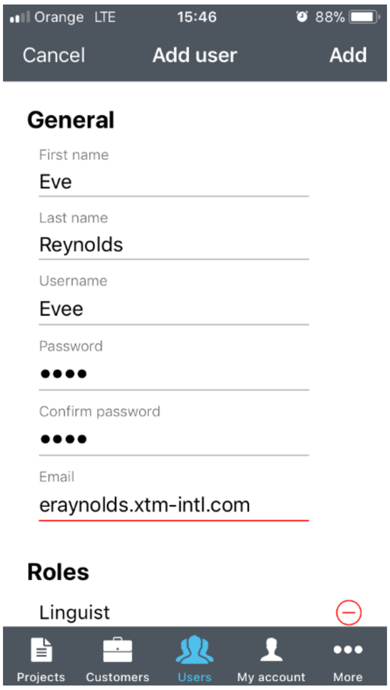
This screen displays a list of users in your system. Touch a user from the list to display their details including phone numbers, language combinations, e-mail address, role, and workflow steps.



The list of users in the XTM mobile app

You can send an e-mail message to a user or call them directly from the app when they have at least one phone number set. When they have more phone numbers available, you can select which one to call. When the user has a mobile you can as well send a text message.

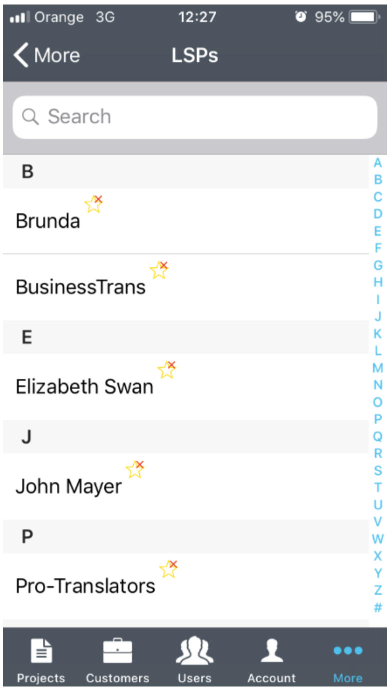
Adding new users
Touch the plus icon in the top right corner of the screen to start adding a new user. The information required to create a new user is the same as in the web version of XTM.



Adding a user

LSPs

This section displays the list of LSPs. When there is no project manager assigned to a customer, you can see the icon to the right. LSPs with whom the connection is established are displayed in black. LSPs with whom XTM cannot connect are displayed in red.



The list of LSPs in the XTM mobile app

LSP Details

Touch an LSP to go the LSP Details screen. The LSP Details screen consists of two tabs:

- General info
- Connection

General info

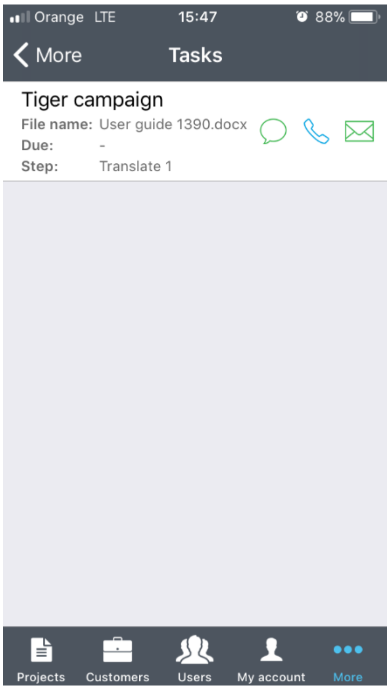
The General info tab contains basic LSP information including the company name, project manager assigned, address, e-mail address, phone and VAT number. When an LSP has phone numbers, including a mobile, you can call them or send a text message. You can also send an e-mail.

Connection

The Connection tab provides the information for a bilateral connection with an LSP.

Tasks

The Tasks screen displays the list of tasks currently assigned to you. You can see the Project name, the file assigned, the workflow step due date and the task workflow step.

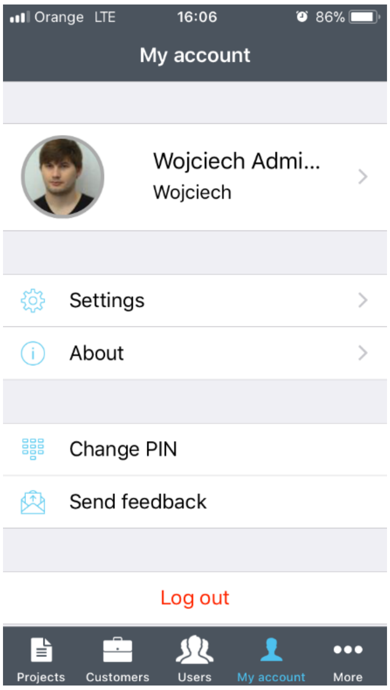


The list of tasks assigned to the user

My Account

The top part of the screen displays your name and role. To view your details including your e-mail address, phone numbers and address, touch the section with the user name. If some data is incorrect or missing, you can modify it there.

Below your name and role you can find two tabs: Settings and About as well as two buttons Change PIN and Send feedback. Also, there is a Log out button at the bottom of the screen.



My account

Settings

The settings tab contains the options to change the default maps provider and to enable or disable the fingerprint reader to unlock the app.

About

Under the About tab you can find the XTM privacy policy and third party notices to read.

Change PIN

Touch the Change PIN option to change the PIN code you need to enter when the open XTM app has not been used for longer than 5 minutes.

Send feedback

Touch Send feedback to send us an email with your opinion about the XTM app.

Log Out

Touch the Log out option on the XTM app context menu to log out from the app or log in to a different server or account.

Offline mode

The offline mode is activated when the Internet connection is lost. In the offline mode you can browse the application as usual but you are not allowed to make any changes.

10. XTM Connect for Google Sheets

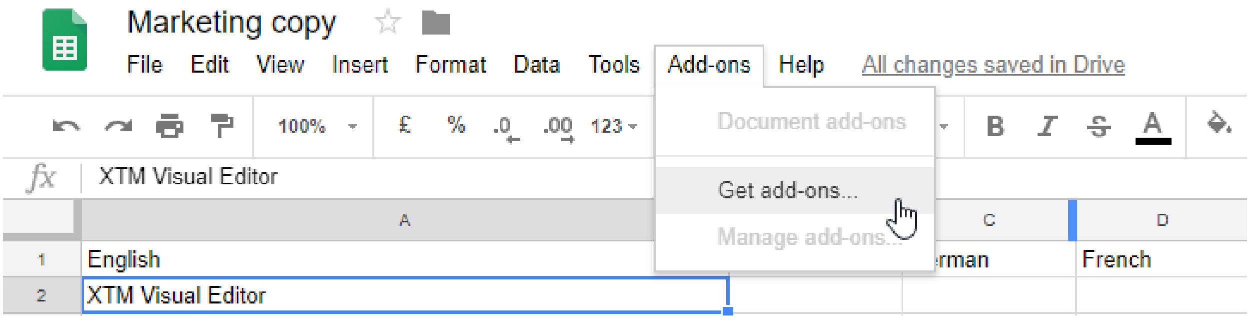
Introduction

XTM Connect for Google Sheets is an auxiliary XTM application that automates project creation in XTM. When translation is finished, the extension returns the translated text to Google Sheets. The add-on is installed directly in Google Sheets and can be used with any web browser.

Use of the application is provided under a separate software license and is not included in the standard XTM license or subscription agreement.

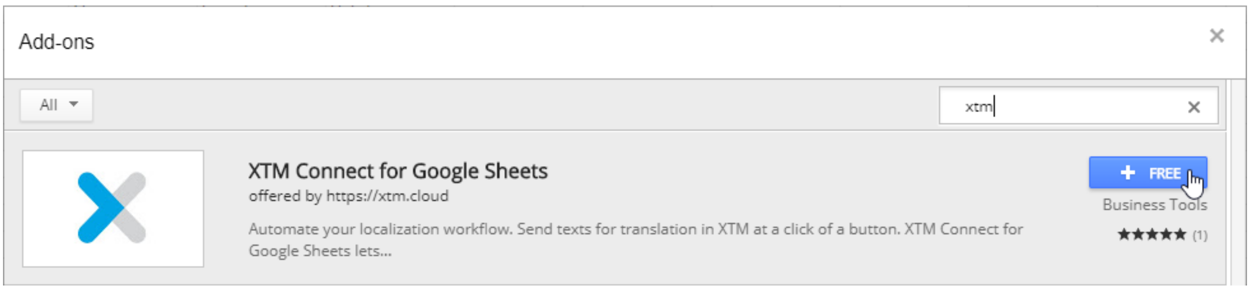
Installation

Open the Google sheet where you want the XTM add-on installed. Click Add-ons, then Get add-ons…



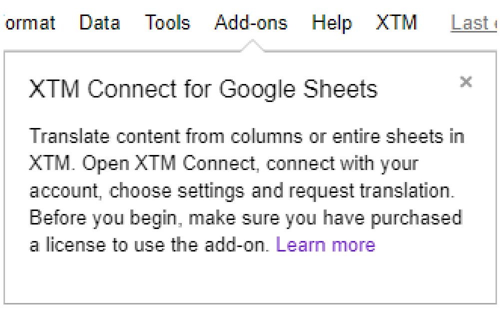
XTM Connect for Google Sheets installation step one

Type “XTM” in the Search add-ons field. Click the “+ FREE” button” to begin the installation. You may be asked to log in to your Google account to continue. When prompted, allow the application the required rights and access.



XTM Connect for Google Sheets installation step two

When the installation finishes, a new XTM item will be added to the menu, and the tip below will be displayed.

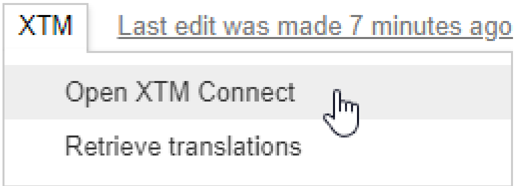


XTM Connect for Google Sheets installation completed

Overview

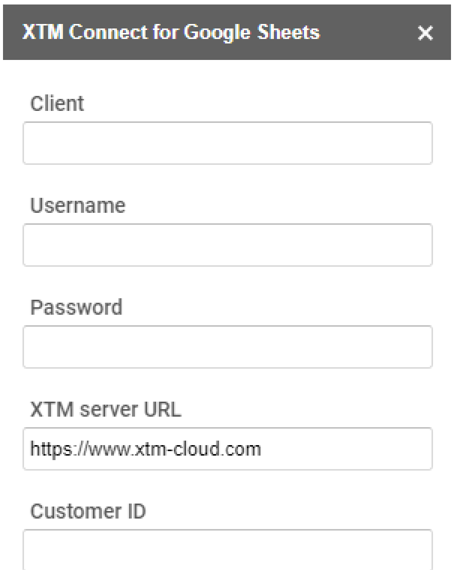
Logging in

To run the add-on, click XTM, then Open XTM Connect.



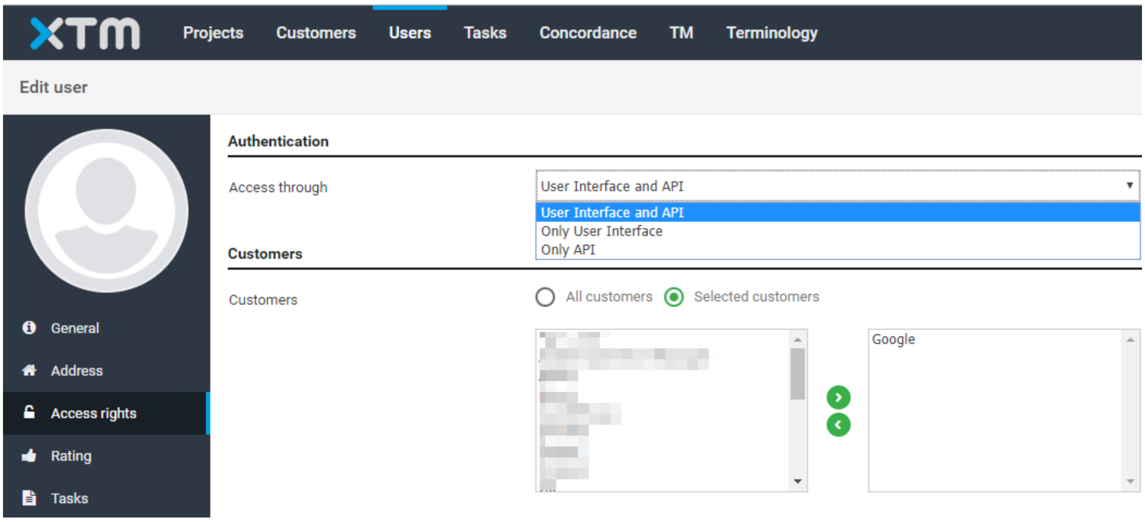
Opening XTM Connect in Google Sheets

A new panel will be displayed to the right. Fill in the fields, and click Connect to XTM.



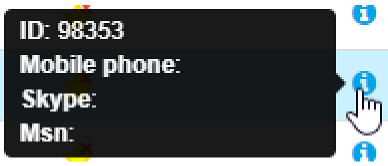
Logging in to XTM Connect for Google Sheets

The user logging in to XTM Connect for Google Sheets must be allowed to use API. You can enabled the user's access in XTM, Users > Edit user > Access rights > Authentication > Access through. Choose either User Interface and API or Only API option. Otherwise, the add-on will not let the user log in.



Enabling API access for a user

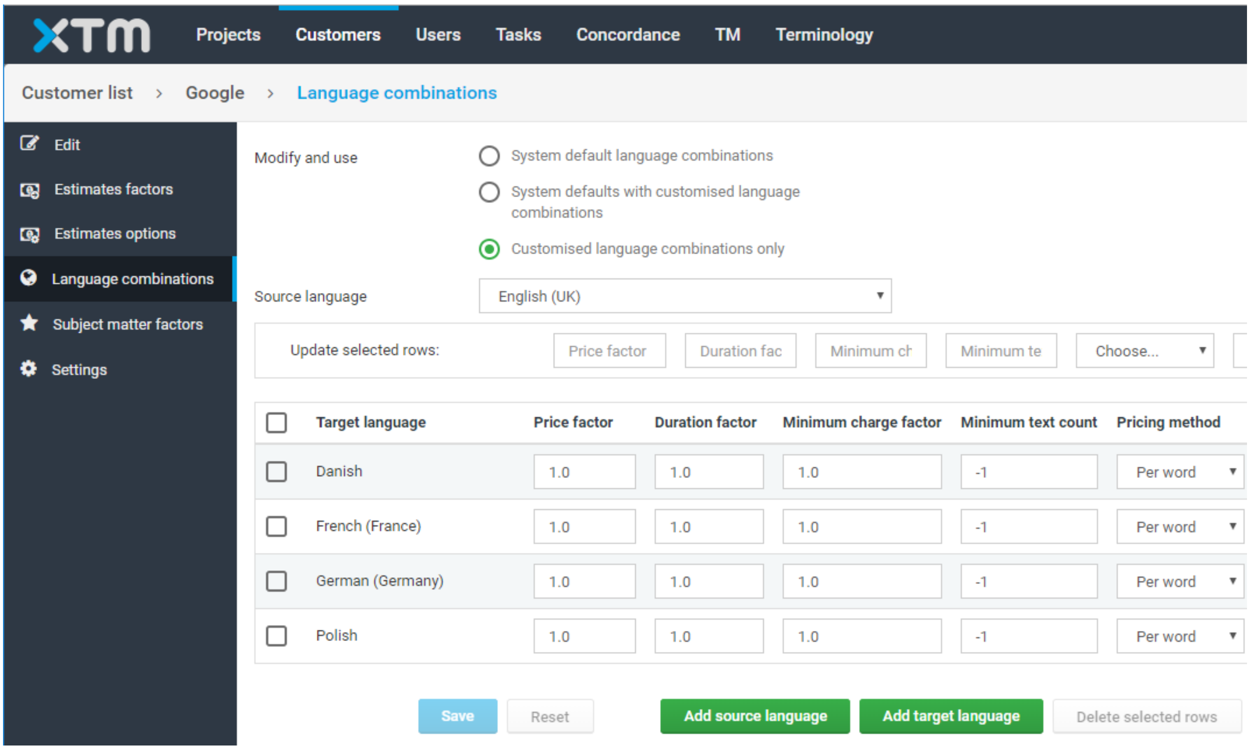
You can find customer ID in XTM, Customers > Customer list, when you mouse over the icon.



XTM – Customers – Customer list

Language combinations

When the add-on connects to XTM, it checks language combinations of the customer whose ID was used to log-in. The customer must be configured to use customised language combinations only. Their source and target languages are available for use in XTM Connect for Google Sheets.



Customised language combinations only must be used to synchronise languages between the customer and XTM Connect for Google Sheets

Translation modes

The application will remember your credentials, and will not ask you to log in again. XTM Connect for Google Sheets can translate cells from specified columns or the entire active sheet. Each of the modes can be combined with your predefined templates and allow you to choose a due date for the project.

Translating columns

In this mode, you can specify columns with the source text and where translations for the specified languages should be returned. Also, it is possible to choose a range of source cells for translation.

Mapping languages

XTM Connect for Google Sheets recognizes columns in the sheet by their letters and contents of cells in the first row. Before requesting translation, you have to map columns with the source and target languages..

Example:

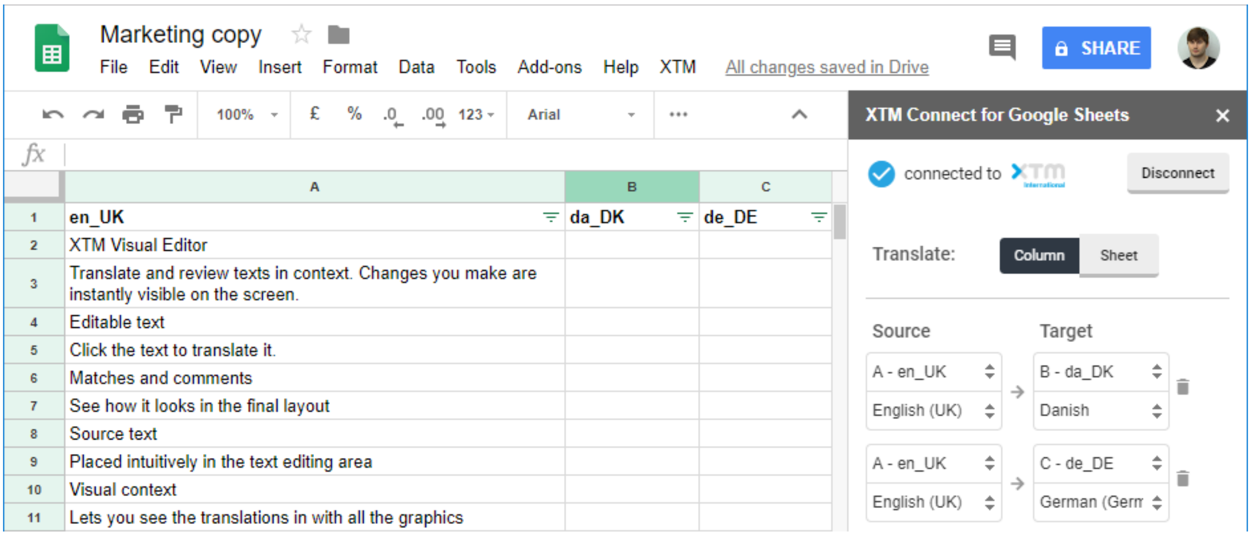
Source language

If your source text is in English, in column A, and the first cell in column A contains text "en_UK", you have to map it with the right version of English, that is "English (UK)".

AND

Target languages

Column B in your sheet contains "da_DK" in the first row, and you want to receive Danish translation beneath while column C contains "de_DE" in the first cell, and you want to have German (Germany) translation there, you have to map these values with the customer's configured languages as show below.



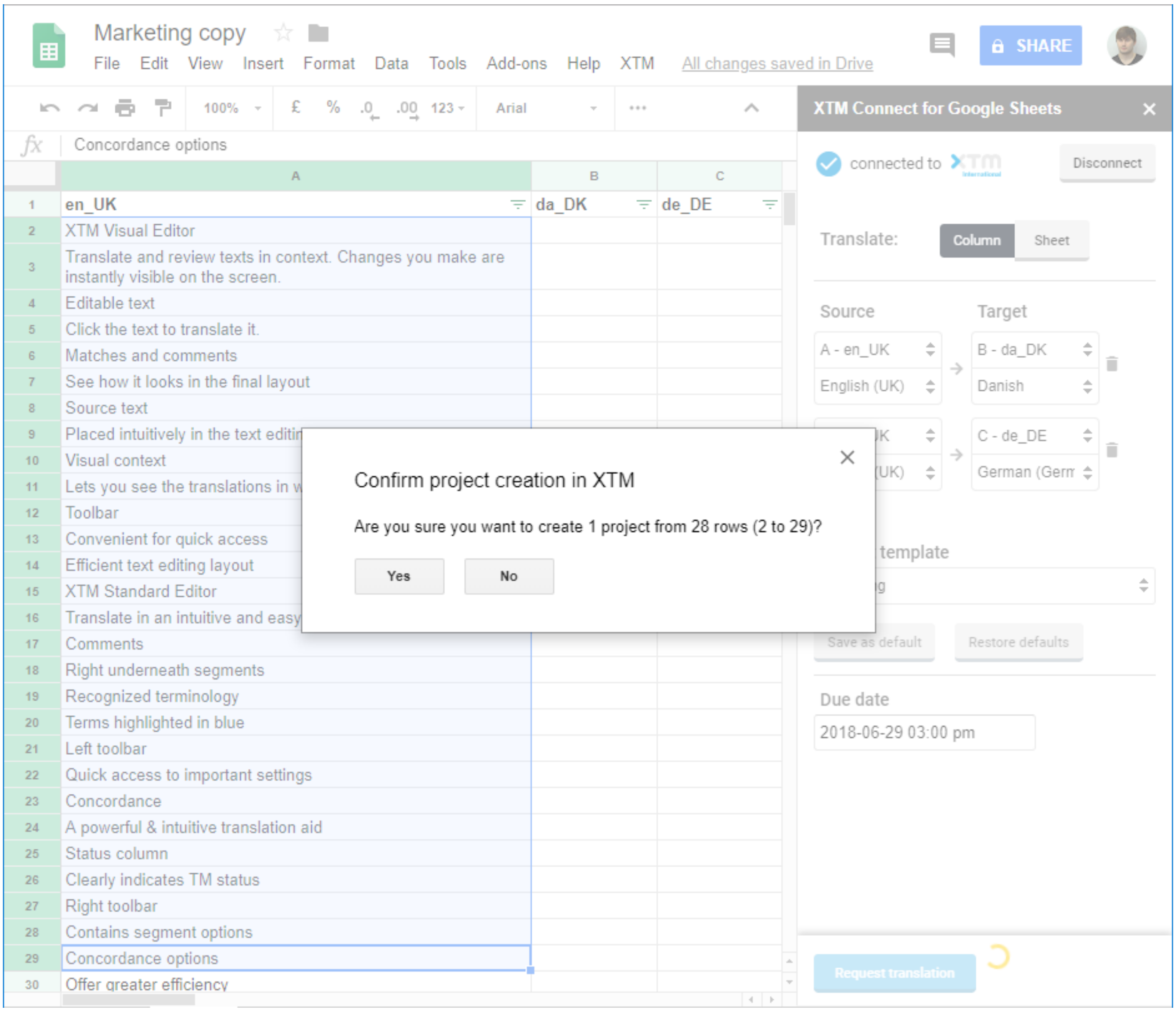
Mapping source and target languages

Saving/restoring defaults

Language mappings together with the project template choice can be saved as defaults. The default values will be loaded any time you log in again. When you change these settings, and want to return to the original configuration, you can click the button to restore the defaults.

Requesting translation

Check that you have mapped languages correctly, choose a project template, and specify a due date for the project. Then, go to the source text column and select the range of cells for translation. You can make the selection with Ctrl or Shift buttons pressed. Make sure that target cells are empty in the rows you want to translate. Request translation and confirm project creation.



Requesting translation of cells from the source column

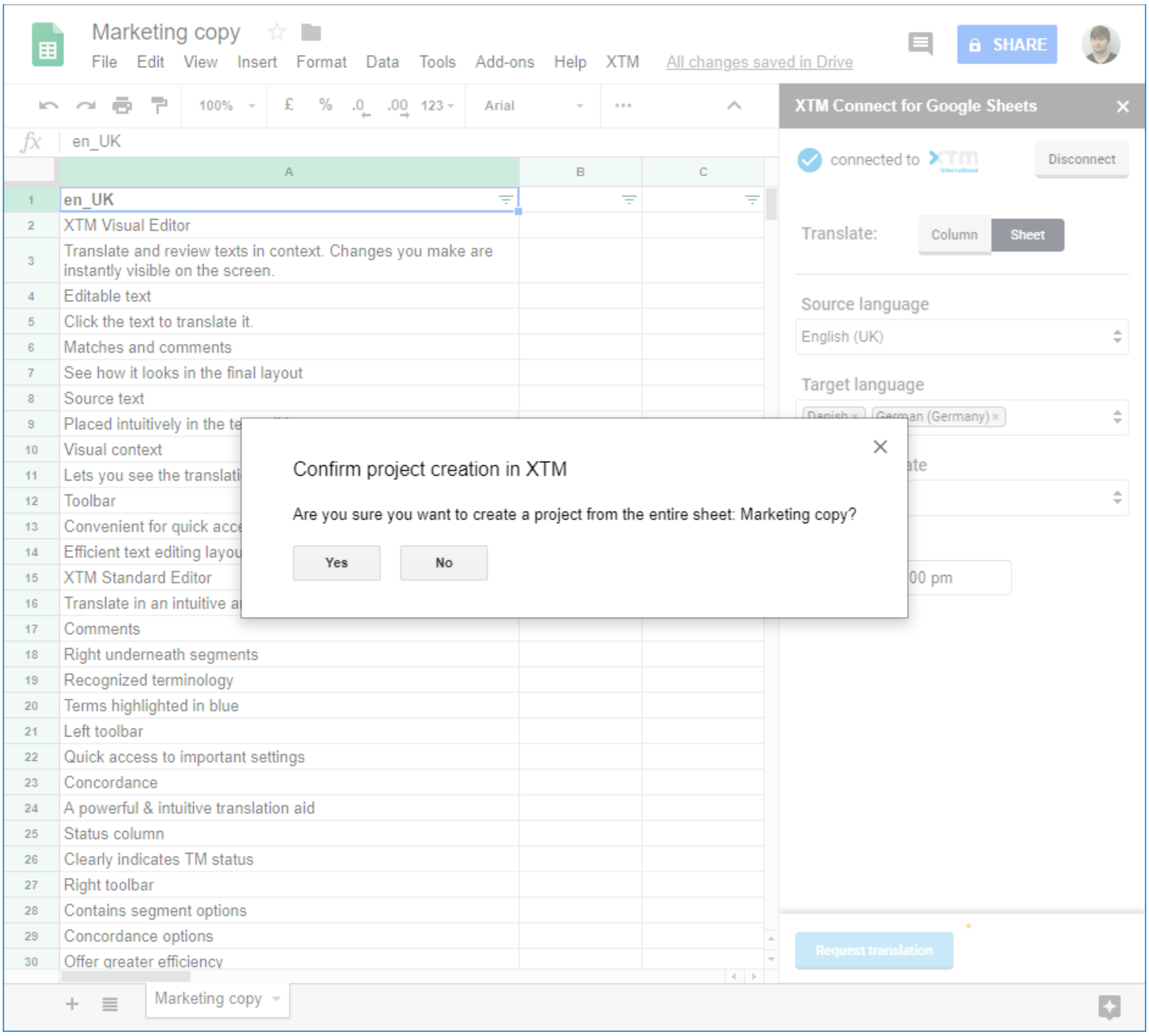
When translation has been requested, cells in the columns intended to receive the translation are filled with the following text: *Do not edit! Waiting for translation from XTM.* Also, each of the cells has a note with a cell id. These cells must not be modified. The cell contents must stay as is to allow the translation to return.

Translating sheets

In this mode, the active sheet is taken for translation into one or multiple languages. Only one sheet can be requested for translation at a time.

Requesting translation

Choose the source and target languages, optionally a project template and a due date for the project. Then click Request translation.



Requesting translation of an entire sheet

When a translation has been requested, new tabs are created with the original sheet name extended with the target language code. Some cells in the newly created tabs contain the following text: *Do not edit! Waiting for translation from XTM.* Also, each of the cells has a note with a cell id. These cells must not be modified. The cell contents must stay unchanged for the translation to return.

11. XTM Xchange

XTM Xchange is a module of XTM that brings together translators with organisations that have translation requirements. It is composed of two sections:

1) A directory of freelancer translators and companies
2) A market place where project managers looking for translation resources can publish jobs and registered users can quote to do the work. The project manager can then review the quotes, select the most appropriate candidate and either import their details into their own database of users or allocate the work to them as subcontractors.

Registering with XTM Xchange

Anyone can register with XTM Xchange and the registration process is different depending on whether you are already an XTM user.

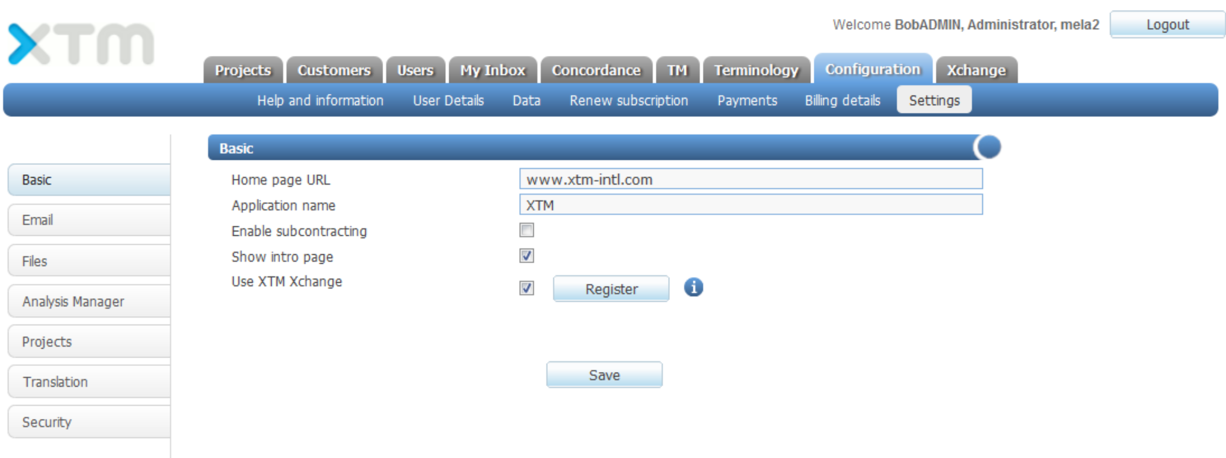
People or companies who are not already XTM users.

If you do not already have an XTM account you need to complete and submit a form on the XTM International website. You will then receive an email with the logon details. The link to this form is http://www.xtm-intl.com/xchange-register

Existing XTM users

If you already have an XTM account then follow these steps to activate XTM Xchange and Register your details:

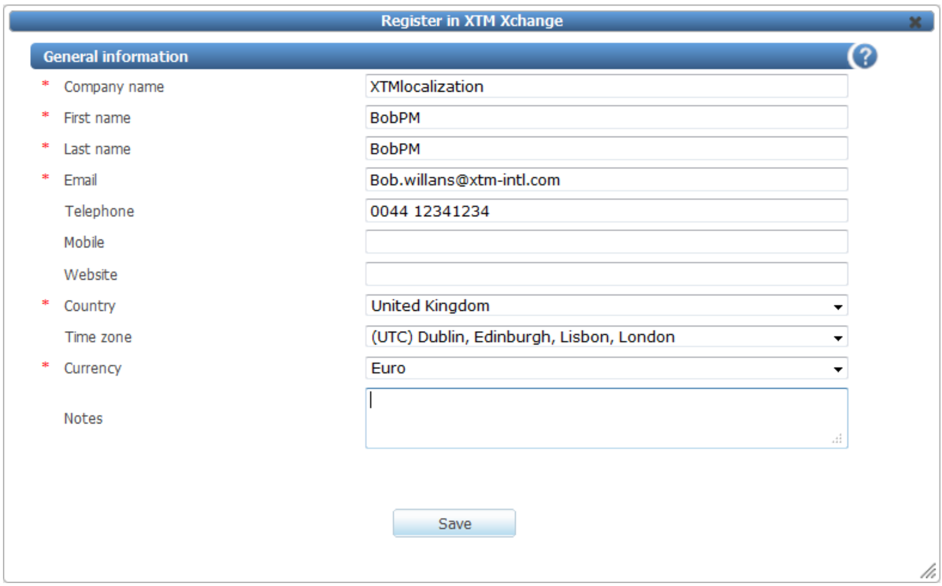
1) Go to Configuration - > Settings and check the “use XTM Xchange” check box
2) Click save
3) An Xchange tab will appear at the top and a register button will appear.



Activating XTM Xchange

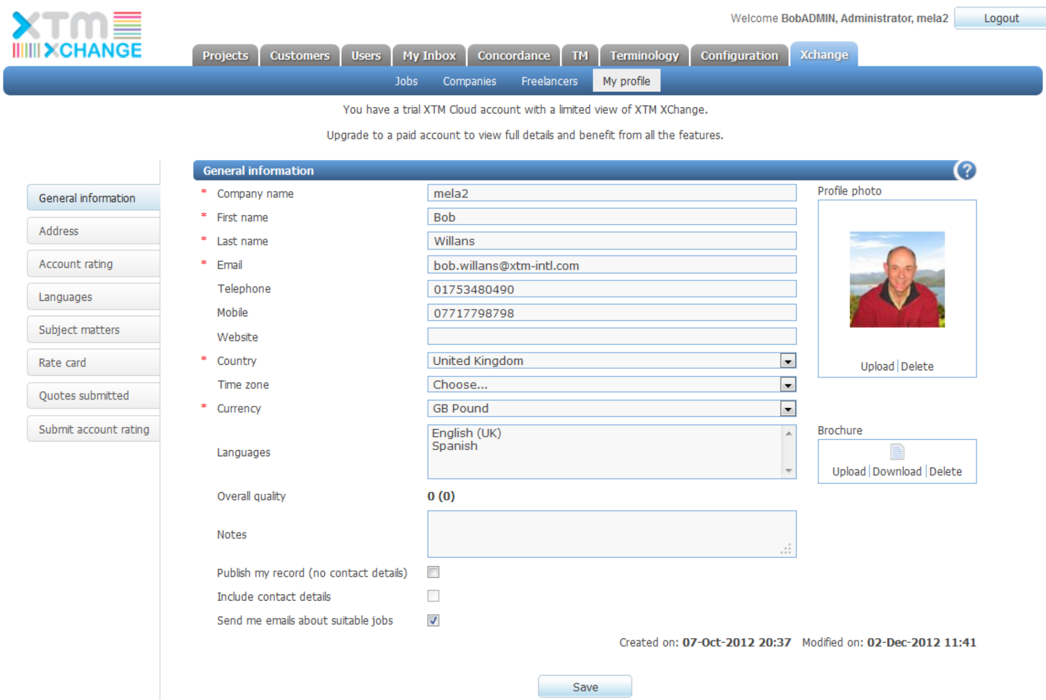
4) Click the Register button

All your details will be defaulted into the General Information fields. Add any missing data and click Save.



Activating XTM Xchange

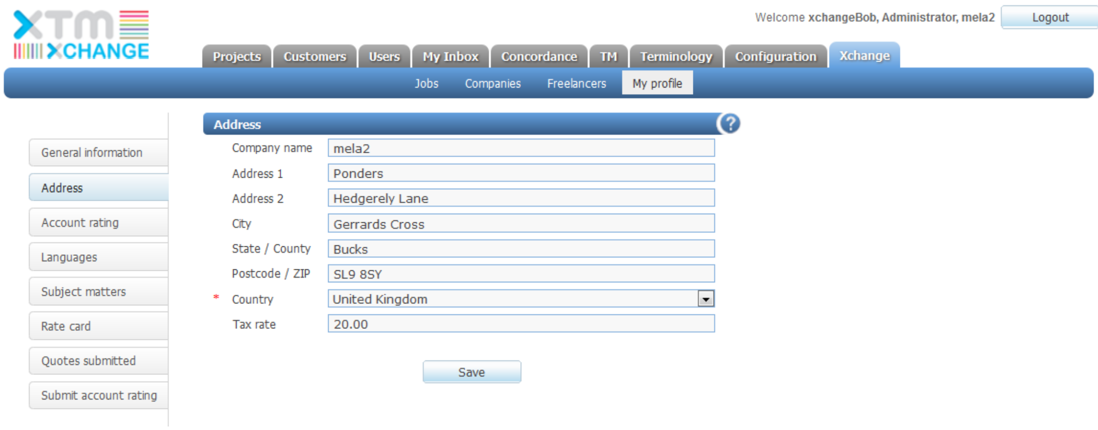
When you have saved your initial data you are then able to enter more information about you as a person or a company.



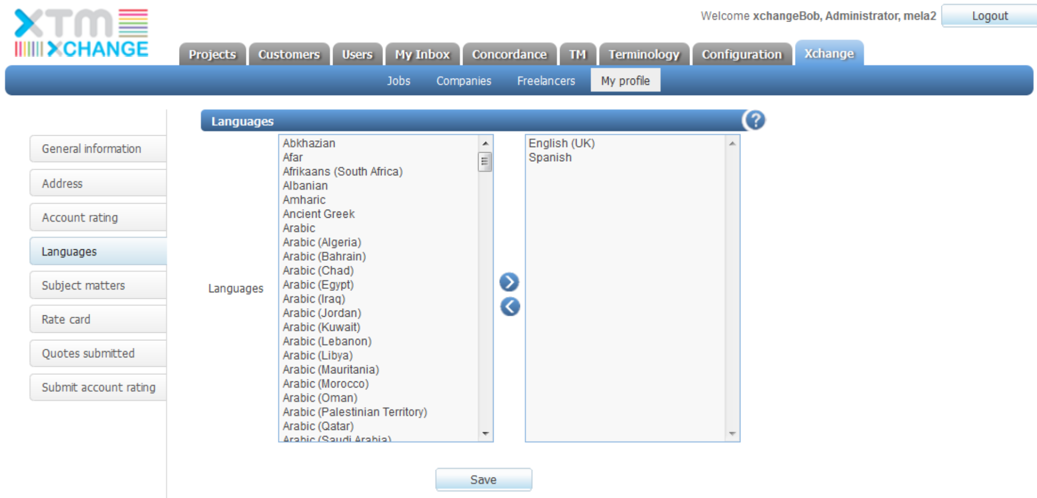
XTM Xchange My profile General information

If you wish to publish your record in XTM Change check the “Publish my record (no contact details)” box, then if you wish your contact information to be published check the “Include contact details” box

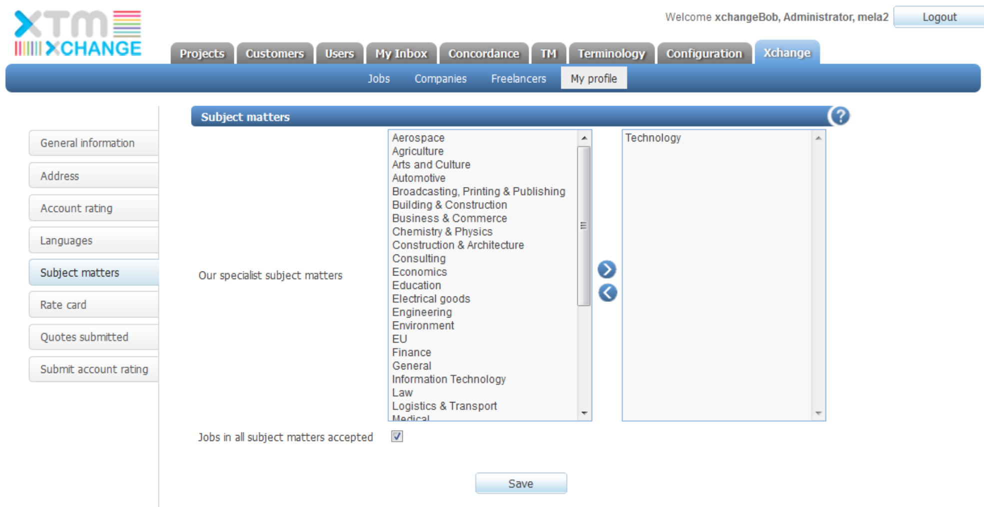
Next enter the information on the following tabs: Address, Languages, Subject matters, & Rate card



XTM Xchange My profile Address



XTM Xchange My profile Languages



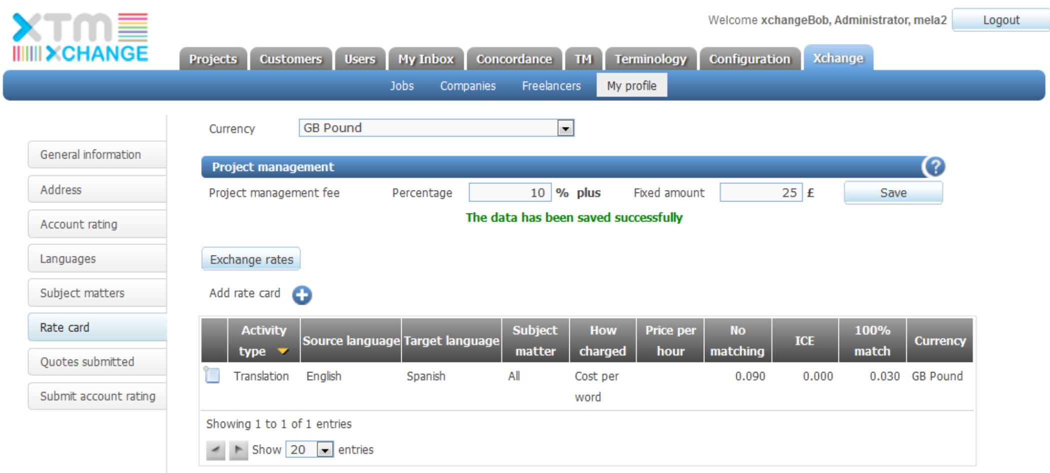
XTM Xchange My Profile Subject matters

You can create multiple rate cards in XTM for each combination of the following elements:

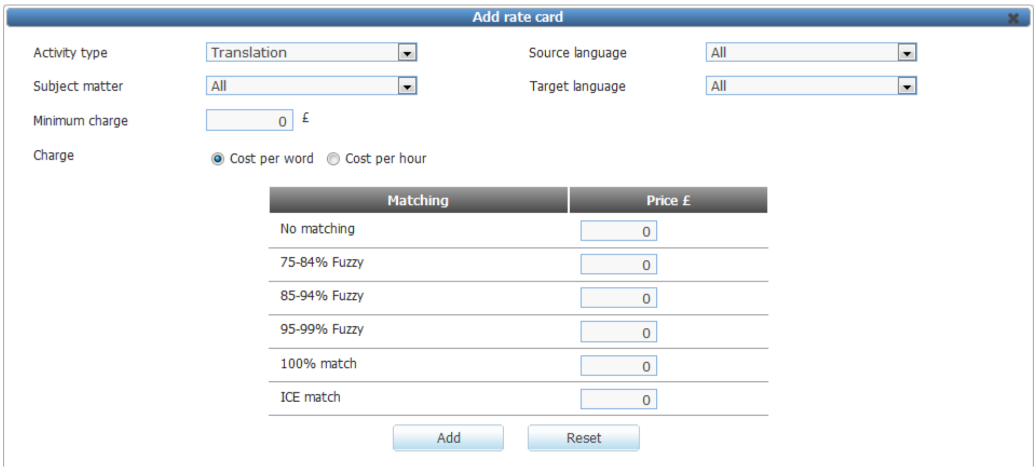
- Activity type

- Language combination
- Subject matter

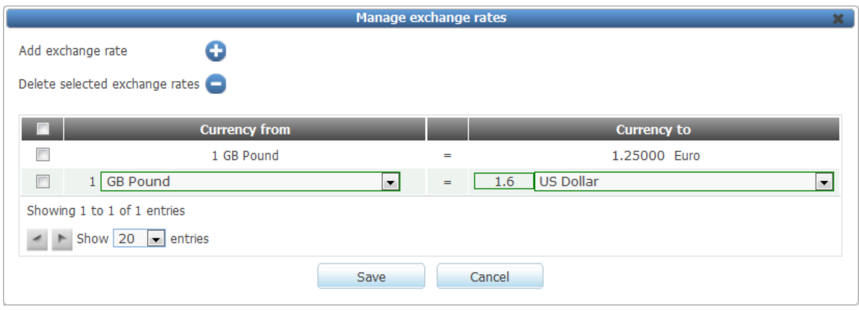
The rate card currency defaults from the value on the general information tab, but you can set it manually to create a rate card in any currency. Alternatively you can enter exchange rates so that when you have to quote in another currency the rate card will be automatically converted.



XTM Xchange My profile Rate cards



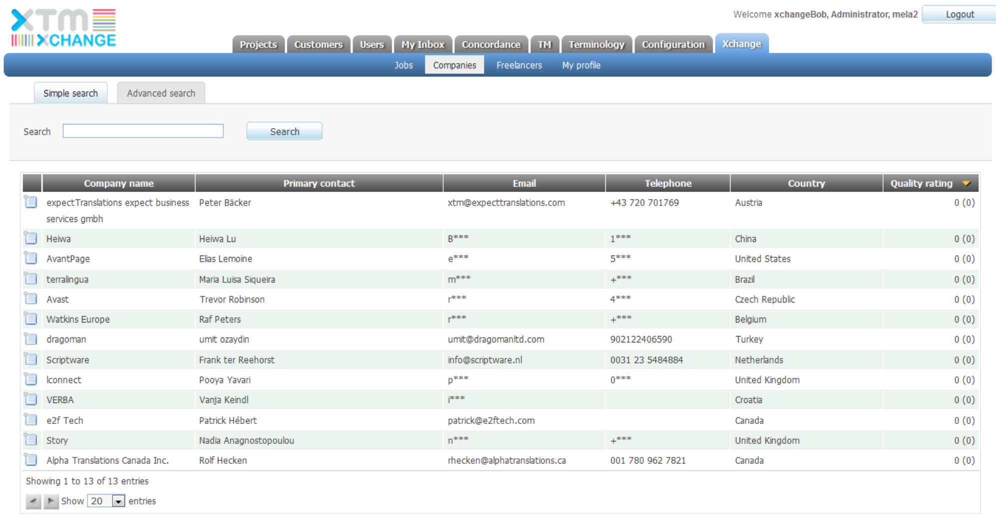
Adding a new rate cards



Adding a new currency exchange rate

The directory of companies

Clicking on the companies tab lists all the companies that have registered with XTM Xchange. If a company has chosen not to publish their details, or you are a demo user of XTM, then key parts of their information are replaced by stars ***

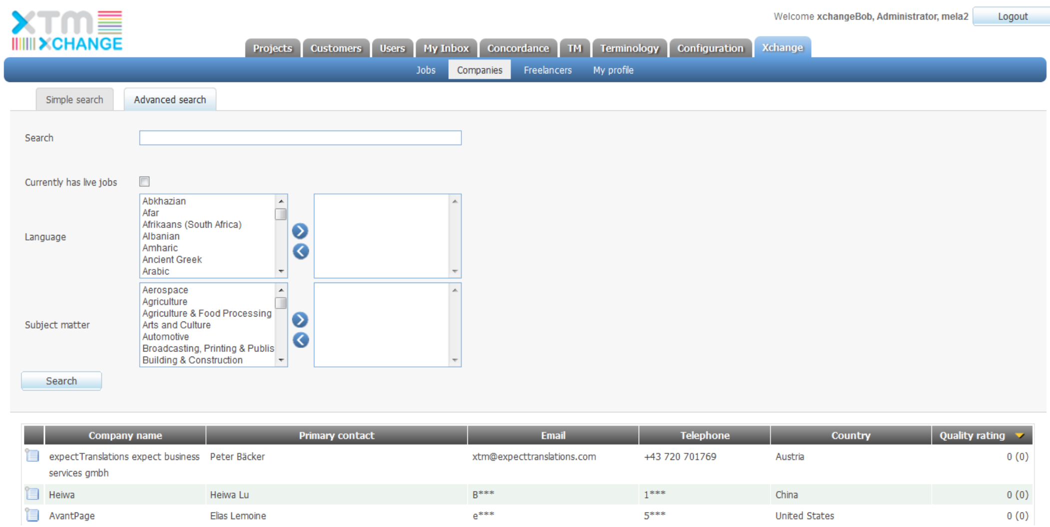


XTM Xchange Company listing

Double click on a line to view the details of each company.

To find specific company you can either use the quick search field which searches on

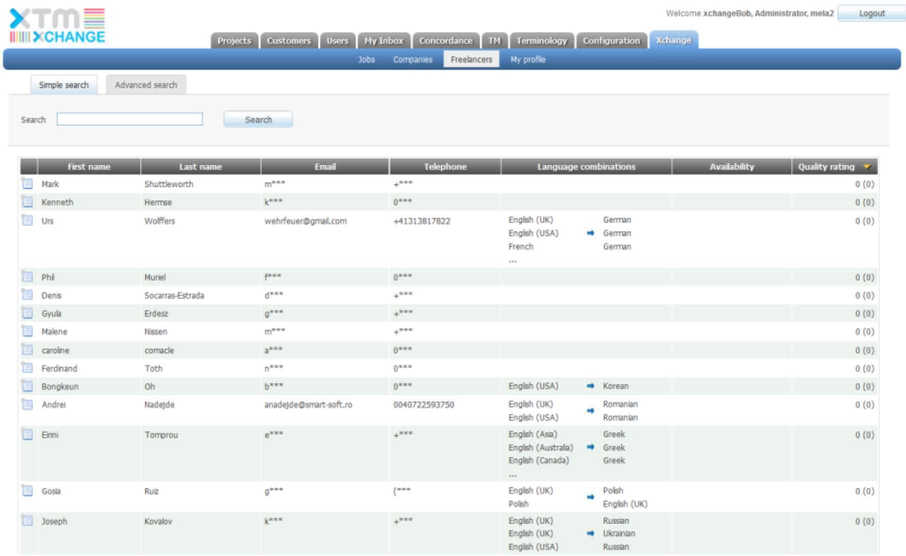
Or click on the Advanced search tab which also allows you to specify language or subject matter



XTM Xchange Company Advanced search

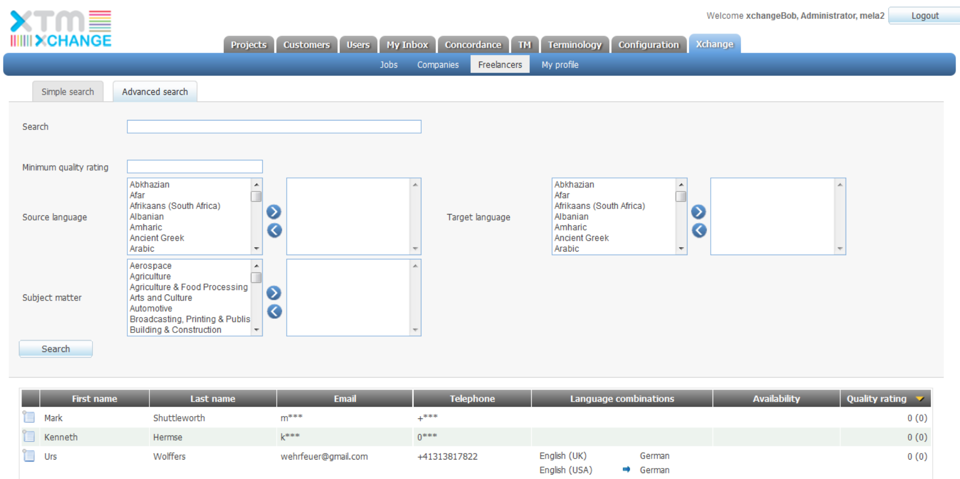
The directory of freelancers

Clicking on the Freelancers tab lists all the freelancers that have registered with XTM Xchange. Again if a freelancer has chosen not to publish their details, or you are a demo user of XTM, then key parts of their information are replaced by stars ***



XTM Xchange Freelancer listing

Double click on a line to view the details of each freelancer.

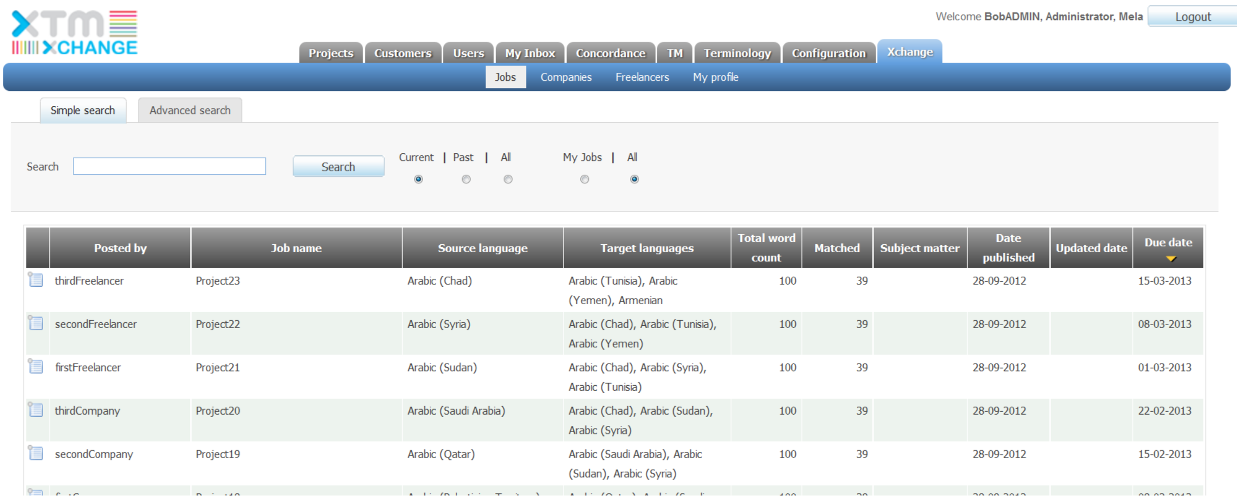


XTM Xchange Freelancer Advanced search

The list of Jobs

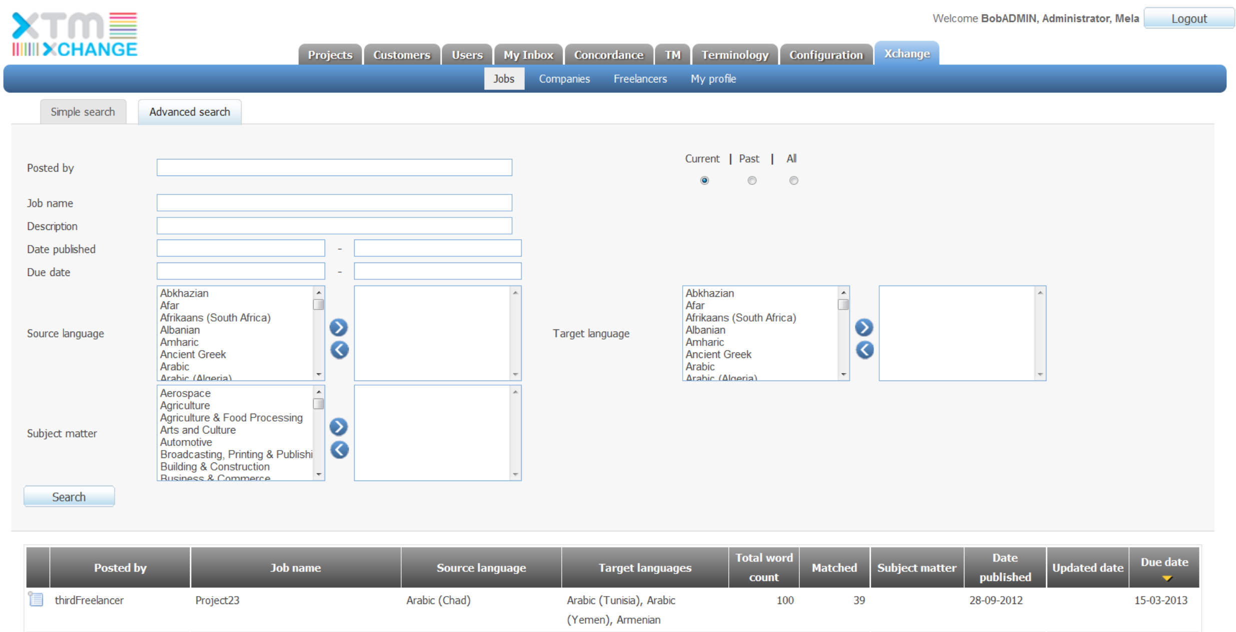
Clicking on the jobs tab displays the full list of jobs. You can filter the jobs by using the search field at the top or using the radio buttons to view:

- Current, all or past jobs
- Your jobs or all jobs



XTM Xchange Job listing

The advanced search tab allows you to carry out a very detailed search for jobs



XTM Xchange Jobs Advanced search

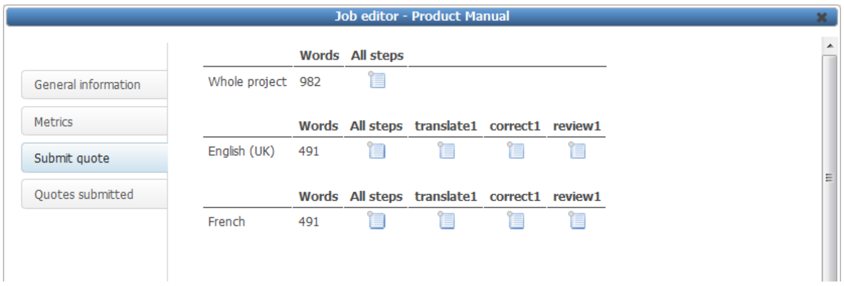
Submitting a quote for a job

Once you have found your job double click it to view the details. There are 4 tabs:

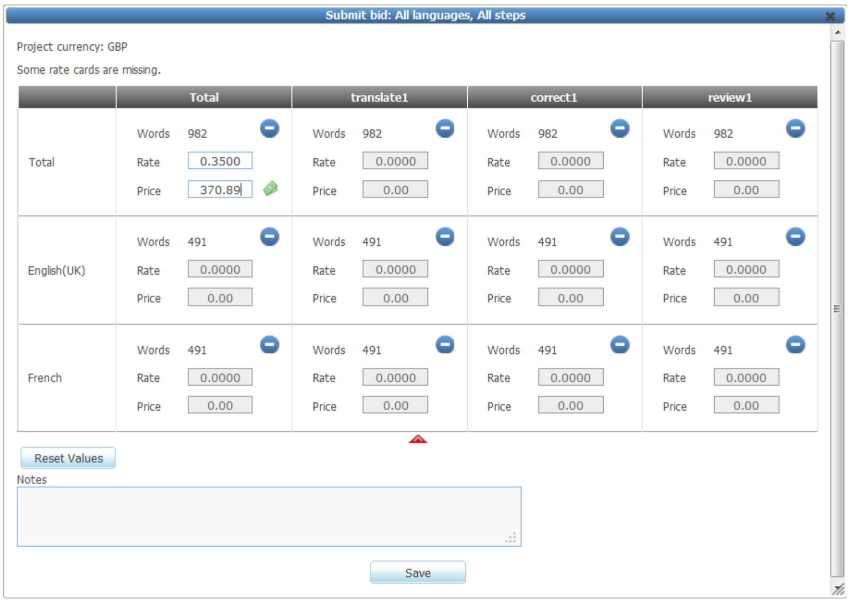
- General Information – View the subject matter required languages and project dates.
- Metrics – View the word count, TM matches and repetitions

- Submit quote – Enter a quote for either the whole job or whole target language or a step for a target language.
- Quotes submitted - Review the quotes you have submitted

The general information about a job



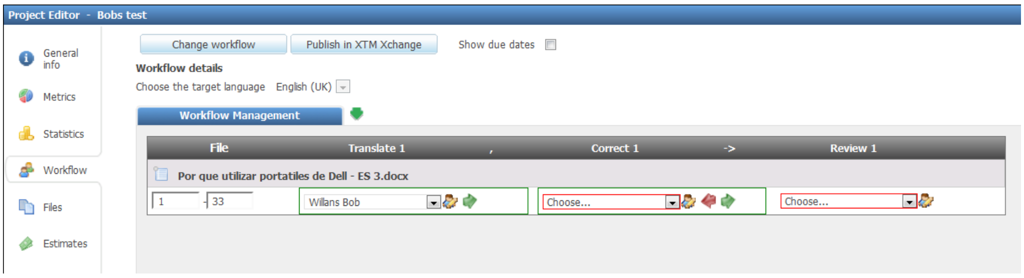
Selecting the appropriate language or step for entering a quote



Entering a quote for a job.

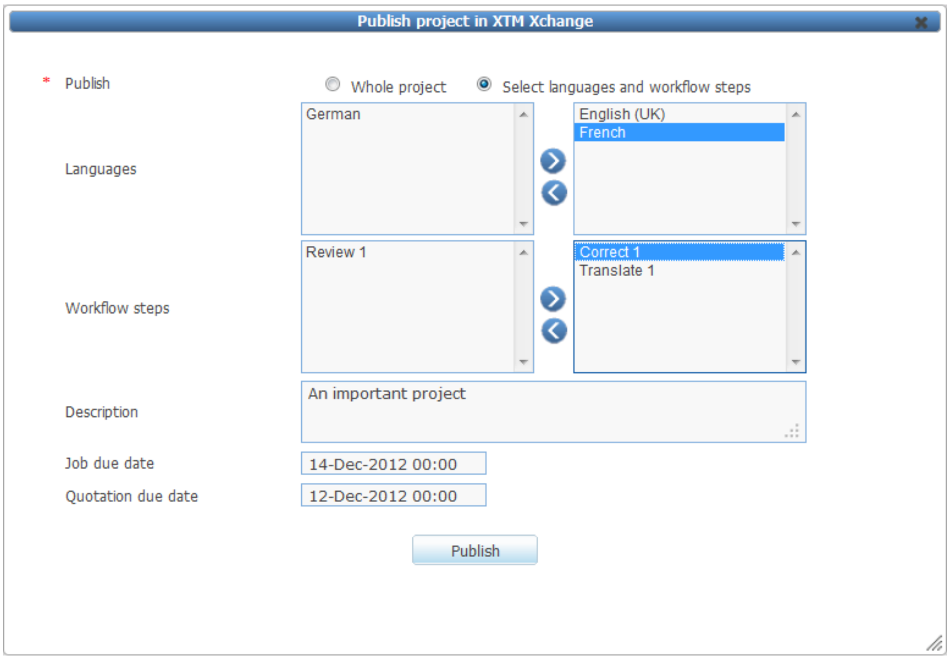
Publishing a job

To publish a job in XTM Xchange click the “Publish in XTM Xchange” button on the Workflow tab.



Project editor, workflow tab showing the publish to XTM Xchange button

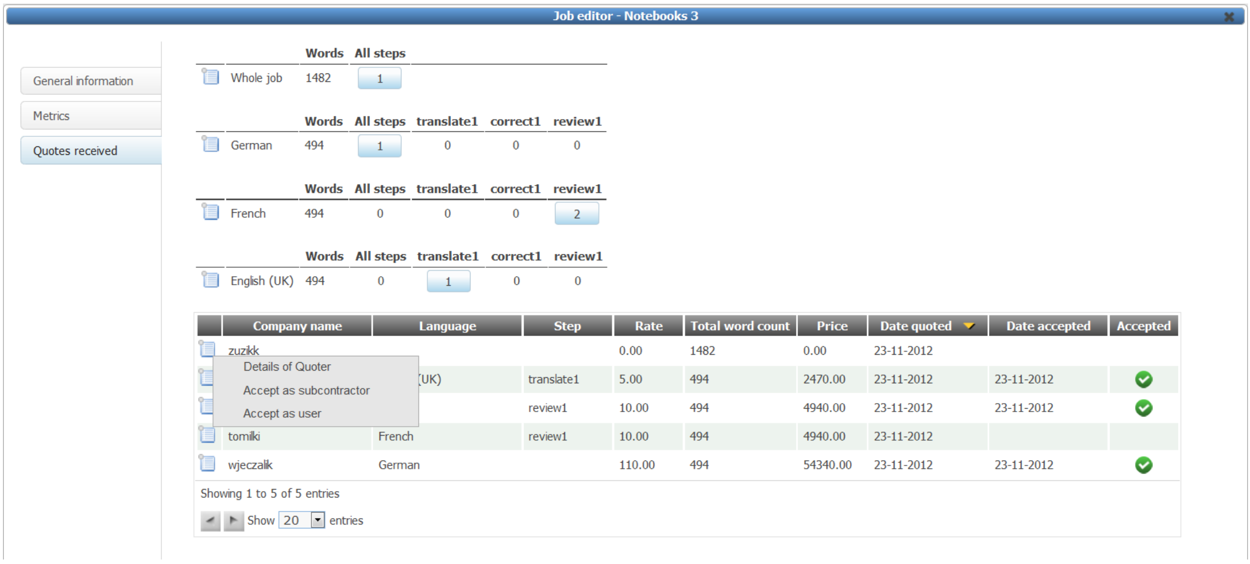
A window appears where you can set a number of options. Firstly you can choose to publish the project as a whole or you can choose to publish selected languages or steps in the workflow. You can then add some descriptive text, set the job due date and the quotation due date. Click the Publish button to publish the project to XTM Xchange.



Publishing a job for selected languages and workflow steps.

Reviewing the quotes received for a job

From the job listing select my jobs and view the details of the job. Click on the tab “Quotes received”



Reviewing the quotes for a job.

By default all the quotes are listed in the line listing. You can filter the quotes by clicking on the buttons in the top section. The listing displays the detail of the quote and the total price.

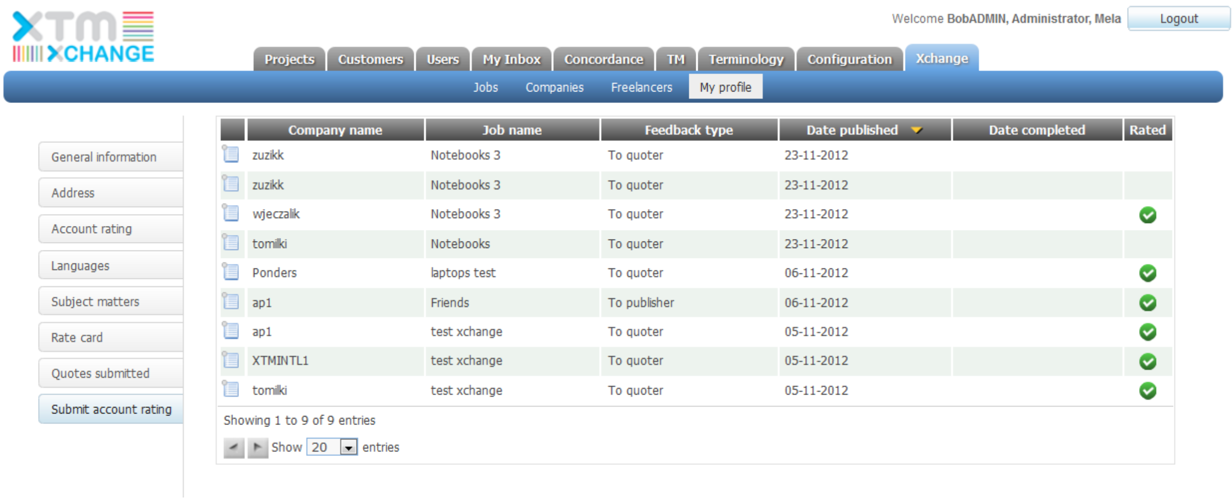
To view the details of the quoter click on the menu icon and select the item from the menu. The information there together with the price will allow you to accept the best quote or quotes. There are two options for accepting the quote.

1) Import the details of the freelancer into your copy of XTM and then allocate the work to them in the Project editor > Workflow tab.

2) Set up the quoter as a subcontractor. In this case a connection is automatically created between your instance of XTM and theirs. They will be automatically allocated to the tasks in the workflow.

Submitting an account rating

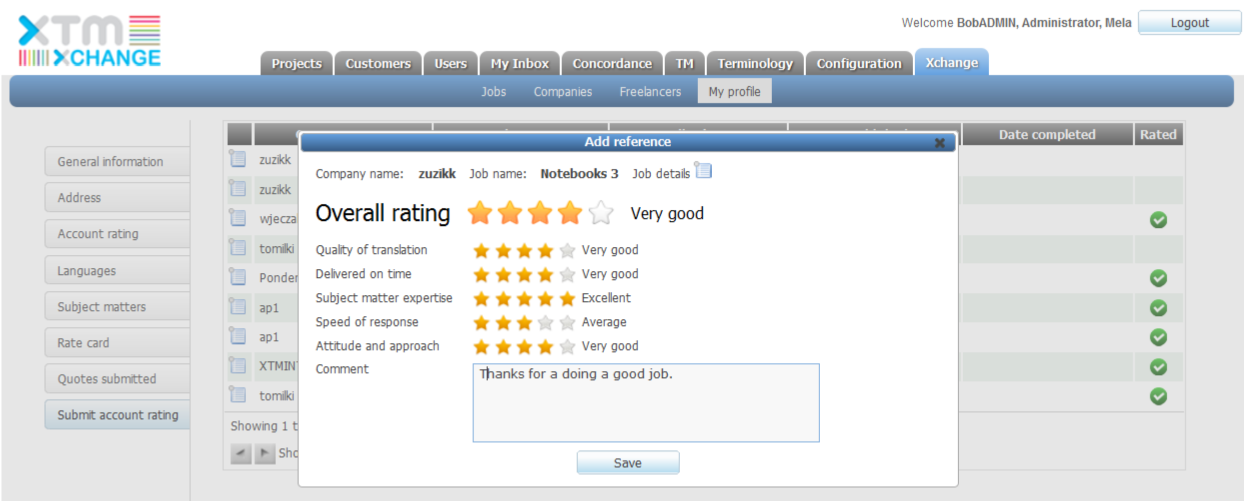
You can rate the all the people and companies that you have worked with either as a publisher or as a quoter. The “Submit account rating” on the My profile tab lists all your interactions with XTM Xchange members. Any interactions that you have already rated are marked with a green tick icon .



Reviewing ratings that have been submitted or awaiting submission

To enter a new rating double click on the line and the rating window pops up. Basic information about the job is given at the top and clicking on the job details icon gives you information about the job metrics and quote.

You can either set the value for individual attributes by clicking on the number of stars and then XTM will calculate the overall rating for you, or you can just enter the overall rating.



Entering a rating

Exit this window by clicking the save button.

12. Appendix 1

Glossary

API (application programming interface). A software interface that enables applications to communicate with each other. An API is the set of programming language constructs or statements that can be coded in an application program to obtain the specific functions and services provided by an underlying operating system or service program.

Bidirectional (writing system). A writing system in which text is generally flush right, and most characters are written from right to left, but some text is written left-to-right as well. Arabic and Hebrew are the only bidirectional writing systems in current use.

Bundle. A project manager may divide the text segments of a job into sections which are called bundles. Bundles can be allocated to different linguists.

Computer aided translation (CAT). Computer technology applications that assist in the act of translating text from one language to another.

Concordance. An alphabetical index of a word or phrase in the source text showing every contextual occurrence of the word or phrase in the text and in the available TM.

Content management system (CMS). A system used to store and subsequently find and retrieve large amounts of data. CMSs were not originally designed to synchronize translation and localization of content, so most have been partnered with globalization management systems (GMS).

DITA (Darwin Information Typing Architecture). An XML-based architecture for authoring, producing and delivering technical information. This architecture consists of a set of design principles for creating “information typed” modules at a topic level and for using that content in delivery modes such as online help and product support portals on the web.

Domain. A knowledge domain that a user is interested in or is communicating about. A group of computers or devices that shares a common directory database and is administered as a unit.

Fuzzy match. Refers to the situation when a sentence or phrase in a translation memory (TM) is similar (but not a 100% match) to the sentence or phrase the translator is currently working on. The TM tool calculates the degree of similarity or “fuzziness” as a percentage figure.

Globalization management system (GMS). Also known as Translation Management System (TMS) Focuses on managing the translation and localization cycles and synchronizing those with source content management. Provides the capability of centralizing linguistic assets in the form of translation databases, leveraging glossaries and branding standards across global content.

GMX-V (Global information management Metrics eXchange – Volume). A word and character count standard for electronic documents. GMX-V is developed and maintained by OSCAR (Open Standards for Container/Content Allowing Re-use), a special interest group of LISA (Localization Industry Standards Association). GMX-V, one of the tripartite series of standards from LISA, deals with electronic document metrics. GMX is made up of the following standards: GMX-V — Volume; GMX-C — Complexity; and GMX-Q — Quality.

HTML. Hyper Text Markup Language (HTML) is a markup language that uses tags to structure text into headings, paragraphs, lists and links, and tells a web browser how to display text and images on a web page.

In context exact match (ICE match). Refers to the situation when a sentence or phrase in a translation memory (TM) is the same phrase in the same context as the sentence or phrase the translator is currently working on.

Internationalization (i18n). The process of generalizing a product so that it can handle multiple languages and cultural conventions without the need for redesign. In i18n, the common abbreviation for *internationalization*, the *18* refers to the eighteen letters between the *i* and the *n*.

Internationalization Tag Set (ITS). A technology to easily create XML which is internationalized and can be localized effectively.

Java. A programming language originally developed by Sun Microsystems and released in 1995 as a core component of Sun's Java platform. The language derives much of its syntax from C and C++ but has a simpler object model and fewer low-level facilities. Java applications are typically compiled to byte code that can run on any Java virtual machine regardless of computer architecture.

JavaScript. An open-source scripting language for design of interactive websites. JavaScript can interact with HTML source code, enabling web developers to use dynamic content. For example, JavaScript makes it easy to respond to user-initiated events (such as form input) without having to use common gateway interface.

Job. In the XTM Workflow the processing of one file from the source language to one target language is a job.

JSP. Java Server Pages (JSP) have dynamic scripting capability that works in tandem with HTML code, separating the page logic from the static elements — the actual design and display of the page — to help make the HTML more functional.

Leveraged match. A leveraged match is when a sentence or phrase in a translation memory (TM) is the same phrase in a different context as the sentence or phrase the translator is currently working on.

Localization (l10n). In this context, the process of adapting a product or software to a specific international language or culture so that it seems natural to that particular region. True localization considers language, culture, customs and the characteristics of the target locale. It frequently involves changes to the software's writing system and may change keyboard use and fonts as well as date, time and monetary formats. In l10n, the common abbreviation for *localization*, the *10* refers to the ten letters between the *l* and the *n*.

Machine translation (MT). A technology that translates text from one human language to another, using terminology glossaries and advanced grammatical, syntactic and semantic analysis techniques.

Metrics. A measure of the number of segments, words and characters in the source document, together with a summary of the different types of matching that are present after the translation memory has been applied. It also includes matching from within the document or repetitions.

Open Architecture for XML Authoring and Localization (OAXAL) A reference model of how to construct an effective and efficient system for XML authoring and Localization based on Open Standards.

Project. In XTM translating one or more files from one source language to one or more target languages is a project.

Project management (PM). Project management (PM) is the systematic planning, organizing and controlling of allocated resources to accomplish project cost, time and performance objectives. PM is normally reserved for focused, non-repetitive, time-limited activities with some degree of risk.

Project manager. A professional in the field of project management (PM). He or she has the responsibility of the planning, execution and closing of any project. Key PM responsibilities include creating clear and attainable project objectives, building the project requirements, and managing the triple constraint for projects — cost, time and scope.

Quality assurance (QA). The activity of providing evidence needed to establish confidence among all concerned that quality-related activities are being performed effectively. All those planned or systematic actions necessary to provide adequate confidence that a product or service will satisfy given requirements for quality. QA covers all activities from design, development, production and installation to servicing and documentation

Right-to-left languages. Languages such as Hebrew, Arabic, Urdu and Farsi are written primarily right-to-left. This text flow presents significant text and graphic layout implications.

Software as a service (**SaaS**) is software that is deployed over the internet. With SaaS, a provider licences an application to customers as a service on demand, through a subscription, in a "pay-as-you-go" mode. The SaaS version of XTM is called XTM Cloud.

Segment. A unit of text that the CAT tool creates in order to match against the translation memory. The unit may be a single word, a phrase, one or more sentences, or even a larger unit.

Segmentation Rules eXchange (SRX). The vendor-neutral standard for describing how translation and other language processing tools segment text for processing. It allows translation memory and other linguistic tools to describe the language-specific processes by which text is broken into segments (usually sentences or paragraphs) for further processing.

Source language. The language of a text which is to be translated into another language

Step. The workflow in XTM is composed of steps; the available default steps are: translate, correct and review.

Target language. The language into which a text written in another language is to be translated

Task. In XTM processing a bundle of segments in one step is a task.

Terminology management. Primarily concerned with manipulating terminological resources for specific purposes — for example, establishing repositories of terminological resources for publishing dictionaries, maintaining terminology databases, *ad hoc* problem solving in finding multilingual equivalences in translation work or creating new terms in technical writing. Terminology management software provides the translator a means of automatically searching a given terminology database for terms appearing in a document, either by automatically displaying terms in the translation memory software interface window or through the use of hotkeys to view the entry in the terminology database.

Terminology manager. A computer technology application tool that assists in the translation of text from one spoken language to another.

Translation. The process of converting all of the text or words from the source language to the target language. An understanding of the context or meaning of the source language must be established in order to convey the same message in the target language.

Translation memory (TM). A special database that stores previously translated sentences which can then be reused, in full or in part, on a sentence-by sentence basis. The database matches source to target language pairs.

Translation Memory eXchange (TMX). An open standard, based on XML, which has been designed for exchanging translation memories (TMs) between CAT tools.

Unicode. The Unicode Worldwide Character Standard (Unicode) is a character encoding standard used to represent text for computer processing. Originally designed to support 65,000 characters, it now has encoding forms to support more than 1,000,000 characters.

UNIX. A multiuser, multitasking operating system. It was one of the first operating systems to be written in a higher level programming language, thus making it hardware-independent.

UTF-8 (Unicode transfer format). An encoding form of Unicode that supports ASCII for backward compatibility and covers the characters for most languages in the world.

Web service. A collection of protocols and standards used for exchanging data between applications or systems.

XLIFF (XML Localization Interchange File Format). An XML-based format for exchanging localization data. Standardized by OASIS in April 2002 and aimed at the localization industry, XLIFF specifies elements and attributes to aid in localization. XLIFF could be used to exchange data between companies, such as a software publisher and a localization vendor, or between localization tools, such as translation memory systems and machine translation systems.

XML (eXtensible Markup Language). Extensible Markup Language (XML) is a simple, flexible text format originally designed to meet the challenges of large-scale electronic publishing. XML also plays an increasingly important role in the exchange of a wide variety of data on the Web and elsewhere.

xml:tm XML-based text memory, a LISA OSCAR standard for author and translation memory.

13. Appendix 2

Language codes

XTM is UTF-8 based and so supports all languages. The following is a list of languages and their codes that are currently available in XTM. If you require other languages please contact support@xtm-intl.com

CODE	LANGUAGE
ab	Abkhazian
aa_ET	Afar
af_ZA	Afrikaans (South Africa)
sq_AL	Albanian
am_ET	Amharic
am_ER	Amharic (Eritrea)
grc_GR	Ancient Greek
ar_AA	Arabic
ar_AE	Arabic (United Arab Emirates)
ar_BH	Arabic (Bahrain)
ar_DZ	Arabic (Algeria)
ar_EG	Arabic (Egypt)
ar_EH	Arabic (Western Sahara)
ar_IQ	Arabic (Iraq)
ar_JO	Arabic (Jordan)
ar_KW	Arabic (Kuwait)
ar_LB	Arabic (Lebanon)
ar_LY	Arabic (Libya)
ar_MA	Arabic (Morocco)
ar_MR	Arabic (Mauritania)
ar_OM	Arabic (Oman)
ar_PS	Arabic (Palestinian Territory)
ar_QA	Arabic (Qatar)
ar_SA	Arabic (Saudi Arabia)
ar_SD	Arabic (Sudan)
ar_SY	Arabic (Syria)
ar_TD	Arabic (Chad)
ar_TN	Arabic (Tunisia)
ar_YE	Arabic (Yemen)
hy_AM	Armenian
hy_AM_arevela	Armenian (Eastern)
hy_AM_arevmda	Armenian (Western)
as_IN	Assamese
ast_ES	Asturian (Spain)
ay_BO	Aymara
az_AZ_Cyrl	Azeri (Cyrillic - Azerbaijan)
az_AZ_Latn	Azeri (Latin - Azerbaijan)
ba_RU	Bashkir
eu_ES	Basque
bbc	Batak Toba
bn_IN	Bengali
bn_BD	Bengali (Bangladesh)
bal_IR	Bhutani
bh_IN	Bihari
bi_VU	Bislama
bs_BA_Cyrl	Bosnian (Cyrillic)
bs_BA_Latn	Bosnian (Latin)
br_FR	Breton
bg_BG	Bulgarian
my_MM	Burmese

CODE	LANGUAGE
be_BY	Byelorussian
cal	Carolinian
ca_AD	Catalan
ca_ES	Catalan (Spain)
ceb	Cebuano
cha	Chamorro
ny_MW	Chichewa (Malawi)
zh_YUE	Chinese (Cantonese)
zh_HK	Chinese (Hong Kong)
zh_CN	Chinese (Simplified)
zh_TW	Chinese (Traditional)
zh_SG	Chinese (Singapore)
cmn	Chinese (Mandarin Traditional)
goyu	Chinese (Mandarin Trad. Taiwan)
chk	Chuukese
co_FR	Corsican
hr_HR	Croatian
cs_CZ	Czech
da_DK	Danish
prs_AF	Dari
dv_IN	Divehi
mis	Dothraki
nl_NL	Dutch
nl_BE	Dutch (Belgium)
en_142	English (Asia)
en_BS	English (Bahamas)
en_AE	English (United Arab Emirates)
en_AU	English (Australia)
en_CA	English (Canada)
en_DE	English (Germany)
en_NL	English (Holland)
en_HK	English (Hong Kong)
en_IN	English (India)
en_IE	English (Ireland)
en_KE	English (Kenya)
en_MY	English (Malaysia)
en_ZA	English (South Africa)
en_CH	English (Switzerland)
en_GB	English (UK)
en_SG	English (Singapore)
en_US	English (USA)
en_NZ	English (New Zealand)
en_AT	English (Austria)
en_NT	English (Neutral)
en_CY	English (Cyprus)
cfm	Falam Chin
eo	Esperanto
et_EE	Estonian
ee_GH	Ewe (Ghana)
fo_FO	Faroese (Faroe Islands)

CODE	LANGUAGE
fj_FJ	Fijian
fil_PH	Filipino
fi_FI	Finnish
fr_FR	French (France)
fr_BE	French (Belgium)
fr_CA	French (Canada)
fr_CG	French (Congo)
fr_SN	French (Senegal)
fr_CH	French (Switzerland)
fr_LU	French (Luxembourg)
fr_MA	French (Morocco)
fr_SN	French (Senegal)
fy	Frisian
fu	Fula
gl_ES	Galician (Spain)
ka_GE	Georgian
de_DE	German (Germany)
de_AT	German (Austria)
de_BE	German (Belgium)
de_CH	German (Switzerland)
de_LU	German (Luxembourg)
de_NL	German (Holland)
el_GR	Greek
el_CY	Greek (Cyprus)
kl_GL	Greenlandic
grn	Guarani
gu_IN	Gujarati
ht_HT	Haitian Creole
ha_NG	Hausa
xz_AF	Hazaragi (Afghanistan)
he_IL	Hebrew
hi_IN	Hindi
hil	Hiligaynon
hmn	Hmong
hmn_US	Hmong (USA)
hu_HU	Hungarian
haw	Hawaiian
is_IS	Icelandic
ig	Igbo
ilo	Ilocano
id_ID	Indonesian
ia	Interlingua
ie	Interlingue
iu	Inuktitut
ium	Iu Mien
ik	Inupiak
ga_IE	Irish
it_IT	Italian
it_CH	Italian (Switzerland)
ja_JP	Japanese
jv_ID	Javanese
kar	Karen
ksw	Karen (Sgaw)
kn_IN	Kannada
ks	Kashmiri
kk_KZ	Kazakh
ogo	Khana (Ogoni proper)

CODE	LANGUAGE
km_KH	Khmer
kg_CG	Kikongo (Kongo)
rw_RW	Kinyarwanda (Rwanda)
ky	Kirghiz
rn	Kirundi
sw_KE	Kiswahili (Africa)
tlh	Klingon
kok_IN	Konkani (India)
ko_KR	Korean
kos	Kosraean
kun	Kunama (Western Eritrea)
ku_TR	Kurdish (Turkey)
kmr	Kurdish (Kurmanji)
ckb	Kurdish (Sorani)
ku_IQ	Kurdish (Iraq)
lo_LA	Laothian
la	Latin
lua	Luba-Lulua
lug	Luganda
lb_LU	Luxembourgish
lv_LV	Latvian
ln_CG	Lingala
lt_LT	Lithuanian
mk_MK	Macedonian
mg_MG	Malagasy (Madagascar)
ms_MY	Malay (Malaysia)
ms_SG	Malay (Singapore)
ml_IN	Malayalam (India)
mt_MT	Maltese
mah	Marshallese
mi_NZ	Maori
mr_IN	Marathi
mo_MD	Moldavian
mn_MN	Mongolian
sla_ME	Montenegrin
mfe_MU	Morisyen (Mauritian Créole)
na_NR	Nauru
nv	Navajo
nd_ZW	Ndebele
ne_NP	Nepali
nso_ZA	Northern Sotho (South Africa)
no_NO	Norwegian
nb_NO	Norwegian Bokmaal
nn_NO	Norwegian Nynorsk
oc_FR	Occitan
or_IN	Oriya
om_ET	Oromo
ota	Ottoman Turkish
pau	Palauan
ps	Pashto
ps_PK	Pashto (Pakistan)
fa_IR	Persian
pon	Pohnpeian
pl_PL	Polish
pt_PT	Portuguese
pt_BR	Portuguese (Brazil)
pt_MZ	Portuguese (Mozambique)

CODE	LANGUAGE
pt_AO	Portuguese (Angola)
pa_PA	Punjabi
pa_IN	Punjabi (India)
pa_PK	Punjabi (Pakistan)
qu_PE	Quechua
qya	Quenya
rm_CH	Rhaeto-Romance
xr_MM	Rohingya (Myanmar)
ro_RO	Romanian
ro_MD	Romanian (Moldova)
ru_RU	Russian
ru_AM	Russian (Armenia)
ru_AZ	Russian (Azerbaijan)
ru_GE	Russian (Georgia)
ru_MD	Russian (Moldova)
ru_UA	Russian (Ukraine)
sm_WS	Samoan
sg	Sangro
sa_IN	Sanskrit
sc_IT	Sardinian
sco_IE	Scots (Ireland)
sco_GB	Scots (United Kingdom)
gd_GB	Scottish Gaelic
sr_YU	Serbian
sr_RS_Cyrl	Serbian (Cyrillic)
sr_ME_Cyrl	Serbian - Montenegro (Cyrillic)
sr_ME_Latn	Serbian - Montenegro (Latin)
sr_RS_Latn	Serbian - Serbia (Latin)
st	Sesotho
tn_ZA	Setswana (Africa)
sn	Shona
sjn	Sindarin
sd_PK	Sindhi
si_LK	Singhalese
ss	Siswati
sk_SK	Slovak
sl_SI	Slovenian
so_SO	Somali
dsb_DE	Sorbian (Lower)
hsb_DE	Sorbian (Upper)
es_ES	Spanish (Spain)
es_AR	Spanish (Argentina)
es_BO	Spanish (Bolivia)
es_CL	Spanish (Chile)
es_CO	Spanish (Colombia)
es_CR	Spanish (Costa Rica)
es_CU	Spanish (Cuba)
es_DO	Spanish (Dominican Republic)
es_EC	Spanish (Ecuador)
es_SV	Spanish (El Salvador)
es_GT	Spanish (Guatemala)
es_HN	Spanish (Honduras)
es_419	Spanish (Latin America)
es_MX	Spanish (Mexico)
es_NI	Spanish (Nicaragua)
es_PA	Spanish (Panama)

CODE	LANGUAGE
es_PY	Spanish (Paraguay)
es_PE	Spanish (Peru)
es_PR	Spanish (Puerto Rico)
es_US	Spanish (USA)
es_UY	Spanish (Uruguay)
es_VE	Spanish (Venezuela)
es_001	Spanish (International)
es_NT	Spanish (Neutral)
apd_SD	Sudanese Arabic
apd_SD_Latn	Sudanese Arabic (Latin)
sun	Sundanese
sw_SO	Swahili (Somalia)
sw_TZ	Swahili (Tanzania)
sw_UG	Swahili (Uganda)
sv_SE	Swedish
sv_FI	Swedish (Finland)
syr_TR	Syriac
tl_PH	Tagalog
tg_TJ	Tajik
ta_IN	Tamil
ta_SG	Tamil (Singapore)
ta_LK	Tamil (Sri Lanka)
tt_RU	Tatar
te_IN	Telugu
tet_ID	Tetum (Indonesia)
tet_TL	Tetum (Timor-Leste)
th_TH	Thai
bo	Tibetan
ti	Tigrinya
to_TO	Tonga
ts_ZA	Tsonga
tn_BW	Tswana
tr_TR	Turkish
tk_TM	Turkmen
tw	Twi
uk_UA	Ukrainian
ur_IN	Urdu
ur_PK	Urdu (Pakistan)
ug_CN	Uyghur (China)
uz	Uzbek
uz_UZ_Cyrl	Uzbek (Cyrillic)
uz_UZ_Latn	Uzbek (Latin)
uz_AF	Uzbek (Afganistan)
vi_VN	Vietnamese
vo	Volapk
cy_GB	Welsh
wo	Wolof
xh_ZA	Xhosa (South Africa)
yap	Yapese
yi	Yiddish
yi_IL	Yiddish (Israel)
yi_US	Yiddish (USA)
yo_NG	Yoruba
zu_ZA	Zulu (South Africa)

14. Appendix 3

Spelling dictionaries

The following dictionaries are included in XTM for spell checking:

Afrikaans	Kurdish (Turkey)
Amharic	Latin
Arabic	Latvian
Basque	Lithuanian
Bengali	Macedonian
Bulgarian	Malagasy (Madagascar)
Byelorussian	Malay (Malaysia)
Catalan	Malayalam (India)
Catalan (Spain)	Maori
Chichewa (Malawi)	Marathi
Croatian	Mongolian
Czech	Northern Sotho (South Africa)
Danish	Norwegian
Dutch	Norwegian Bokmaal
English (Australia)	Norwegian Nynorsk
English (Canada)	Persian
English (South Africa)	Polish
English (UK)	Portuguese
English (USA)	Portuguese (Brazil)
Esperanto	Punjabi
Estonian	Quechua
Faroese (Faroe Islands)	Romanian
French	Russian
French (Belgium)	Scottish Gaelic
French (Canada)	Serbian
French (Switzerland)	Slovak
Galician (Spain)	Slovenian
German	South Ndebele
German (Austria)	Spanish
German (Switzerland)	Spanish (Latin America)
Greek	Spanish (Mexico)
Gujarati	Swedish
Hebrew	Tagalog
Hindi	Tamil
Hungarian	Thai
Icelandic	Tsonga
Indonesian	Tswana
Irish	Ukrainian
Italian	Urdu
Kannada	Uzbek (Cyrillic)
Kazakh	Vietnamese
Khmer	Welsh
Kinyarwanda (Rwanda)	Xhosa (South Africa)
Kiswahili (Africa)	Zulu (Africa)
Korean	

15. Appendix 4

Specification for an Excel file to import linguists

Column	Sample data 1	Sample data 2	Format	Comments
Title	Mr		text	
First Name	John	Pierwsze	text	Obligatory field
Last Name	Smith	Ostatnie	text	Obligatory field
Job Title	Linguist		text	
Roles	translator,reviewer,tm expert,terminologist	translator	text	Obligatory field
Username	JohnADMIN	uzytkownik	text	Obligatory field
Password	john	haslo	text	Obligatory field
E-mail address	noreply@xtm-intl.com	noreply@xtm-intl.com	text	Obligatory field
Address 1	1 Lower Loxley		text	
Address 2	High Street		text	
City	Ambridge		text	
State/County	Wessex		text	
Postcode/ZIP	SL16 3PJ		text	
Country	GBR	FRA	text	Must use the 3 letter abbreviation for the country
Phone 1	+441494532343		text	
Phone 2	+441494532344		text	
Mobile phone	+447966477181		text	
Fax number	+447966477180		text	
WWW	www.gmail.com		text	
Skype	skypeId		text	
MSN	msnId		text	
Language Combinations	(fr_CA->en_US)	pl_PL->en_GB	text	Obligatory field (Source Language code->target language code)
Qualifications	en_GB->Qualification name, en_GB->BSc		text	language code->qualification
Domains	automotive, pharmaceutical		text	
TM Access Rights	modify,export		text	Options: view, add, modify, export, import
Terminology Access Rights	add,modify		text	Options: view, add, modify, export, import

To add TM and terminology access rights the user needs to be given the respective role

Example XML file for importing linguists

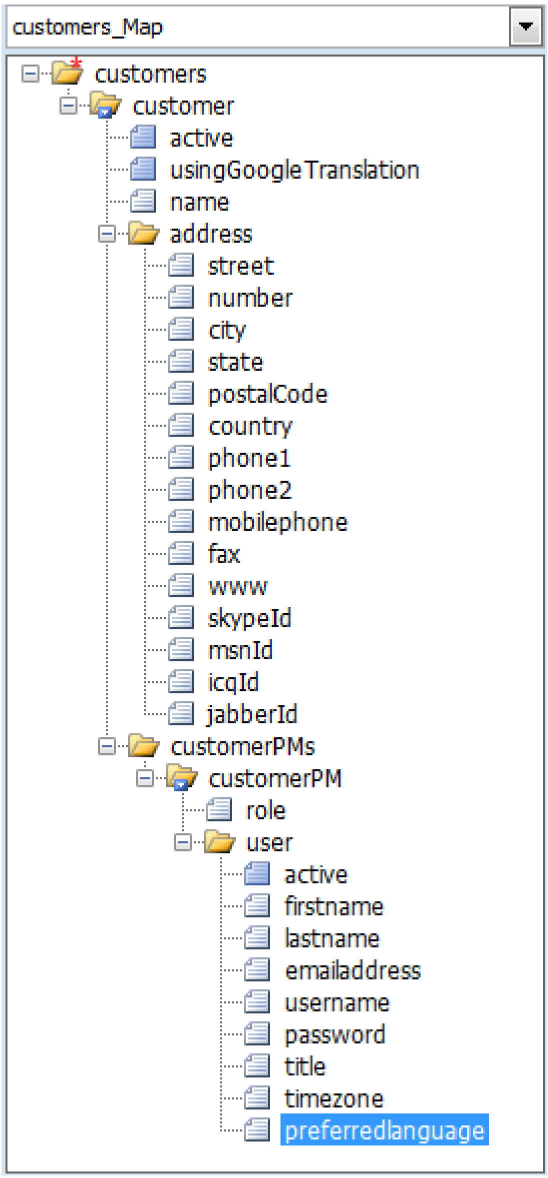
```
<?xml version="1.0" encoding="UTF-8"?>
<suppliers>
	<supplier>
		<user>
			<firstname>TestFirstname</firstname>
			<lastname>TestLastname</lastname>
			<emailaddress>TestEmailaddress</emailaddress>
			<username>TestUsername</username>
			<password>TestPassword</password>
			<title>TestTitle</title>
			<timezone>TestTimezone</timezone>
			<preferredlanguage>en_GB</preferredlanguage><!-- undescrored or dashed IANA codes -->
		</user>
		<address>
			<street>TestStreat</street>
			<number>TestNumer</number>
			<city>TestCity</city>
			<state>TestState</state>
			<postalCode>TestPostalCode</postalCode>
			<country>TestCountry</country>
			<phone1>TestPhone1</phone1>
			<phone2>TestPhone2</phone2>
			<mobilephone>TestMobilephone</mobilephone>
			<fax>TestFax</fax>
			<www>TestWWW</www>
			<skypeId>TestSkypeId</skypeId>
			<msnId>TestMSN</msnId>
			<icqId>TestICQ</icqId>
			<jabberId>TestJabber</jabberId>
		</address>
		<roles><!-- uppercase or lowercase, values: translator, reviewer, corrector -->
			<role>translator</role>
			<role>reviewer</role>
		</roles>
		<languagecombinations>
			<!-- currency values: dollar, euro, morrocan_dirham, pound, yen -->
			<!-- undescrored or dashed IANA codes -->
			<combination source="en_GB" target="pl_PL" costperword="1" currencyperword="euro" costperhour="1" currencyperhour="euro" />
			<combination source="en_GB" target="fr_FR" costperword="2" currencyperword="euro" costperhour="2" currencyperhour="euro" />
		</languagecombinations>
		<domains>
			<!-- AEROSPACE,AGRICULTURE,AUTOMOTIVE,PRINTING,BUILDING_AND_CONSTRUCTION,BUISNESS_AND_COMMERCE,CONSULTING,ECONOMICS,EDUCATION,ELECTRICAL_GOODS,ENGINEERING,FINANCE,INFORMATION_TECHNOLOGY,LAW,MEDICAL,MUSIC_AND_ARTS,PHARMACEUTICAL,REAL_ESTATE,RETAIL,SPORTS_RECREATION,TELECOMMUNICATIONS,TRANSPORT,TRAVEL -->
			<domain>LAW</domain>
			<domain>MEDICAL</domain>
		</domains>
		<qualifications>
			<!-- underscrored or dashed IANA codes -->
			<qualification date="2009-01-01" language="en_GB">
				<name>TestQualificationName1</name>
				<description>Test description of qualification</description>
			</qualification>
		</qualifications>
	</supplier>
	<supplier>
		<user>
			<firstname>TestFirstname</firstname>
			<lastname>TestLastname</lastname>
			<emailaddress>TestEmailaddress</emailaddress>
			<username>TestUsername</username>
			<password>TestPassword</password>
		</user>
		<address>
			<city>ObligatoryTestCity</city>
			<country>ObligatoryTestCountry</country>
			<phone1>ObligatoryTestPhone1</phone1>
		</address>
		<languagecombinations>
			<combination source="en_GB" target="pl_PL" costperword="1" currencyperword="euro" costperhour="1" currencyperhour="euro" />
		</languagecombinations>
	</supplier>
</suppliers>
```

Example file for importing customers

```
<?xml version="1.0" encoding="UTF-8"?>
<customers>
	<customer active="true" usingGoogleTranslation="true"><!-- true,false -->
		<name>TestName</name><!-- unique value -->
		<address>
			<street>TestStreat</street>
			<number>TestNumer</number>
			<city>TestCity</city>
			<state>TestState</state>
			<postalCode>TestPostalCode</postalCode>
			<country>TestCountry</country>
			<phone1>TestPhone1</phone1>
			<phone2>TestPhone2</phone2>
			<mobilephone>TestMobilephone</mobilephone>
			<fax>TestFax</fax>
			<www>TestWWW</www>
			<skypeId>TestSkypeId</skypeId>
			<msnId>TestMSN</msnId>
			<icqId>TestICQ</icqId>
			<jabberId>TestJabber</jabberId>
		</address>
		<customerPMs>
			<customerPM>
				<role>MANAGER</role><!-- MANAGE,VIEWER -->
				<user active="true">
					<firstname>TestFirstname</firstname>
					<lastname>TestLastname</lastname>
					<emailaddress>TestEmailaddress</emailaddress>
					<username>TestUsername</username>
					<password>TestPassword</password>
					<title>TestTitle</title>
					<timezone>TestTimezone</timezone>
					<preferredlanguage>en_GB</preferredlanguage><!-- undescrored or dashed
IANA codes -->
				</user>
			</customerPM>
		</customerPMs>
	</customer>

	<customer active="true" usingGoogleTranslation="true">
		<name>TestName2</name>
		<address>
			<city>ObligatoryTestCity</city>
			<country>ObligatoryTestCountry</country>
			<phone1>ObligatoryTestPhone1</phone1>
		</address>
		<customerPMs>
			<customerPM>
				<role></role>
				<user active="true">
					<firstname>ObligatoryTestFirstname</firstname>
					<lastname>ObligatoryTestLastname</lastname>
					<emailaddress>ObligatoryTestEmailaddress</emailaddress>
					<username>ObligatoryTestUsername</username>
					<password>ObligatoryTestPassword</password>
				</user>
			</customerPM>
			<customerPM>
				<role></role>
				<user active="true">
					<firstname>ObligatoryTestFirstname2</firstname>
					<lastname>ObligatoryTestLastname2</lastname>
					<emailaddress>ObligatoryTestEmailaddress2</emailaddress>
					<username>ObligatoryTestUsername2</username>
					<password>ObligatoryTestPassword2</password>
				</user>
			</customerPM>
		</customerPMs>
	</customer>
</customers>
```

The red section shows the full data set and the section in blue shows an obligatory sub set. The XML file can contain all the customers where every customer element represents one customer. If a customer already exists in XTM then the record is skipped and not imported.



The customer map

Example file for setting language combinations

<language-combinations>
<language-combination source="en_GB" target="af_ZA" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="sq_SQ" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="ar_AA" pricefactor="1.0" durationfactor="1.0" autoQuoting="true" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="be_BY" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
</language-combinations>

16. Appendix 5

Example ITS rules file 1

Each .its file contains ITS rules for a particular file format. An example of such file is shown below.

```
<?xmlversion="1.0"encoding="UTF-8"?>
<its:rulesits:version="1.0"xmlns:its="http://www.w3.org/2005/11/its">

<its:translateRuleselector="//*"translate="no"/>
<its:translateRuleselector="//text"translate="yes"/>

<its:withinTextRuleselector="//var"withinText="yes"/>

</its:rules>
```

Example ITS rules file 2

```
<?xml version="1.0" encoding="UTF-8"?>
<its:rules version="1.0" xmlns:its="http://www.w3.org/2005/11/its">
  <its:translateRule selector="//P" translate="yes"/>
  <its:withinTextRule selector="//P" withinText="no"/>

  <its:translateRule selector="//Br" translate="no"/>
  <its:withinTextRule selector="//Br" withinText="nested"/>

  <its:translateRule selector="//B" translate="yes"/>
  <its:withinTextRule selector="//B" withinText="yes"/>
</its:rules>
```

Further information about ITS rules is available on the internet: http://www.w3.org/TR/its/

Example SRX rules file

```
<?xml version="1.0"?>
<srx version="2.0" xmlns="http://www.lisa.org/srx20" xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance"
	xsi:schemaLocation="http://www.lisa.org/srx20 srx20.xsd">
	<header cascade="no" segmentsubflows="no">
		<formathandle type="start" include="no"/>
		<formathandle type="end" include="yes"/>
		<formathandle type="isolated" include="yes"/>
	</header>
	<body>
		<languagerules>
			<languagerule languagerulename="English">
				<rule break="no">
					<beforebreak>(^|\s|\p{Ps}|\p{Po}|(&lt;[^&gt;]*&gt;))Std\.</beforebreak>
					<afterbreak>\s</afterbreak>
				</rule>

				<rule break="yes">
					<beforebreak>[.?!;]</beforebreak>

	<afterbreak>(\s| )*+(&lt;[^&gt;]*&gt;(\s| )*+)*+(\s| )*+$</afterbreak>
				</rule>
			</languagerule>
		</languagerules>
		<maprules>
			<maprule maprulename="Default">
				<languagemap languagepattern="en*" languagerulename="English"/>
			</maprule>
		</maprules>
	</body>
</srx>
```

17. Appendix 6

Minimum Server Specifications

The server specifications will depend on the expected number of concurrent users. The table below provides an indication of the server specifications for different numbers of concurrent users.

Number of concurrent users	10	25	50	100	200
CPU Cores per machine	2	4	6-8	4-8	8-16
RAM (GB) per machine	32-64	64	64	64	64-128
Disk space for active projects files (GB)	50GB	125GB	250GB	500GB	1TB
Number of machines in cluster	1	1	1	2	3-4
OS - 64 bit versions	Linux / Windows	Linux / Windows	Linux / Windows	Linux	Linux

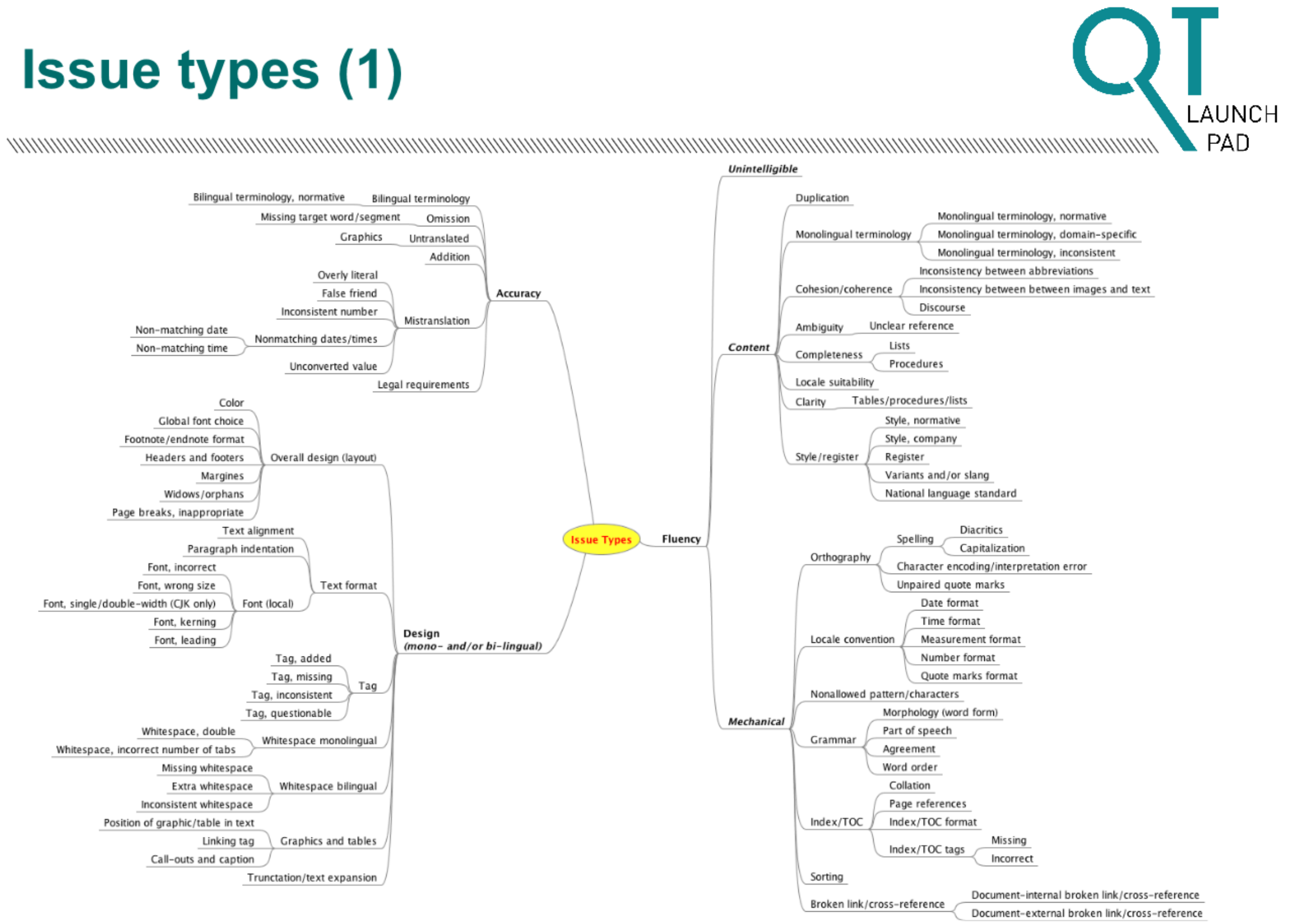
Software runtime environment

- Java 1.8.121 or later
- Applications
  - Open Office v3.0 or later
  - Database
    - PostgreSQL 9.5 or later
    - Microsoft SQL Server 2003 or later

XTM International will be happy to provide further advice about server specifications and configuration for specific installations.

18. Appendix 7

LQA - MQM Issue Hierarchy



For an overview of the structure of the Multidimensional Quality Metrics (MQM)’s set of issue types including a description and examples of each type, please see the online *description of issue types*.

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