

Define, measure, conquer!

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Project
management
costs are fixed
costs



01

A PM's job is to
deliver projects on
time under all
circumstances



02

Our PMs assign
translation, revision
and perform QA



03

We talk about tasks,
jobs, items,
projects, programs,
workflows as we
please



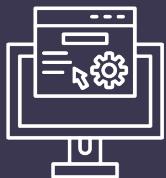
04



The terminology you use depends on the systems you have to use. Harmonization starts there.



You don't want teams and departments **per technology**, you want teams and departments **by function**.



- Business Management System
- Translation Management System
- CAT tool

Most **language service providers** use a single or very few **BMSes**. Most **enterprises** also use some **trackers**.

Definitions

What is a job?

An activity performed for the sake of fulfilling a client request by

- ✓ The PM, an **internal or an external team member**
- ✓ **Based on inputs**
- ✓ **Time-bound** (must be started after a certain other job and finished within a certain time)
- ✓ **Produces a change** (in the text, in a file, in a system status, etc.)
- ✓ **Paid or unpaid**

Some questions of detail to decide on:

Is workflow definition a job?

Are jobs only relating to the translation/producti on process or do you want to include all? (Invoicing, etc.)

How about answering queries?

Do you allow jobs moving backwards?

What is a task?

A task is a series of jobs that start and finish independently from other jobs.

- ✓ Usually a task **relates to a language**
- ✓ A task **relates to a chain of jobs** that you can perform for sure, without waiting for customers.
- ✓ Best to think of tasks as **critical workflows** – such as pre-DTP, final DTP – or optional workflows such as LQA.

A task is the best unit for monitoring.

- ✓ Is job splitting/distribution to multiple vendors a task or a job?
- ✓ Should we consider workflow loopbacks as new tasks?

What is a project?

The project is an arbitrary unit of work, usually implicitly decided on by the LSP (for example based on files, dates or deliveries).

- ✓ Due to technology, you may be offered jobs separately instead of tasks (translation, revision as separate tasks coming from TMSes, vendor portals)
- ✓ Due to technology, you may be offered tasks separately (bilingual workflows making up a multilingual one)
- ✓ Due to overview and frequency of the content, you may want to handle multiple small jobs as tasks.
- ✓ Just think about how many ways there are to manage a content connected project in memoQ.
- ✓ Just think how often your definition of project is based on:
 - Vendor selection/easy work for vendors/outsourcing practices,
 - Technology constraints.

Missing links:



Jobs have units

Time (per minute, per hour), fixed fee, volume (CAT analysis, word count, page count) are most frequent, with the caveat of minimum fees, and weird, senseless constructs such as calculating time based on volume.



Units relate to workflows

In that they are pre- or post-project (e.g. edit distance, post-translation analysis).



Post-project units render the concept of quoting invalid.

Aren't you missing the concept of files/documents?

They are more a source of mistakes than anything relating to workload if the technology is right. But: more documents – more analysis.

Quoting generally is a task, isn't it?

Internal jobs can have a size tag, consider XS/S/M/L – if size depends on something, use job units.

Where does the customer fit in this image?

An **opportunity** is a task or a job offered by the customer.



You can take it.



You can send a quote, with price and time.



You can just learn about it and build a sales strategy on.

Why do customers need quotes?

- ✓ They're not able to predict the cost.
- ✓ They're not able to precisely predict the cost.
- ✓ They need it for documentation reasons.
- ✓ They use the quote to decide who they want to go with.
- ✓ They use the quote to decide whether they want something translated.
- ✓ Other reasons?

The framework of introducing transparency

- ✓ Based on tasks and jobs, create linear workflows.
- ✓ If the PM logs in somewhere and does a click there, it's a job. **Remember:** any change is a job.
- ✓ Whatever workflow step is not documented, consider it not done.
- ✓ For sanity, clean up job types after first exercises.



- PMs will have more documentation work to do.

- Discrepancies will be uncovered.
- Workflows have a way to improve.
- The assumption of every project being unique is challenged.

- Integrations/automations are scenario based.
- PMs will have less work to do.

Opportunity sources:

- external CMSeS,
- file repos,
- customers' vendor portals (SAP or Plunet),
- email,
- customer portal in memoQ,
- customer portal in BMS (can be more than one),
- projects appearing in your memoQ (server-server integration),
- projects appearing in your customer's memoQ (linguist),
- projects appearing in your customer's memoQ (subvendor),
- customers' different TMS,
- your different TMS,

Opportunity types/formats:

- Unformatted document,
- Formatted document,
- Bilingual document (one per language pair),
- Package
- Link, with online workflow only.

External systems clients mandate:

- query management,
- tracker,
- delivery systems

External systems you may use:

- QA such as XBench,
- LQA such as ContentQuo,
- MT embedded/integrated,
- MT with bilingual workflow,
- Separate invoicing tool,
- Separate audiovisual tools.

Automate file-related jobs with memoQ templates!

Process automation's mantra: If This Then That. Templates are a powerful mix of resource selection + automation steps.
Any automation starts with using **Project, Client, Domain, Subject** right.

There are no workflows that cannot be automated. There are negligent customers that don't give you the right metadata and there are barriers to entry. Metadata correction is a job.

There is one decision before the templates: which template do I use. A template is normally per customer per program, e.g. two different XML file types. Plunet and XTRF should improve logic here.



Quotes



Projects



Clients



Providers



Invoicing



CRM



Reports

2022/462: memoQ project

Order

Select Language...

Select Languages...

General

Languages

Process

Jobs

Files

Finance

People

Quality Assurance

History

Process

Start 0 Job(s)

Change Process ▾

Edit Process



There are memoQ jobs in the process. XTRF can create and manage memoQ project for you.

memoQ cloud

One TM per client template + filesystem

Create Project in memoQ

Do not use template

Big Beverage Marketing Blog

Big Beverage Marketing Blog - copy for Plunet test

Big Beverage Stakeholder Publicity

Change tracked documents

Change tracked documents - copy

Clone_for testing

Content connector

Content connector - copy

Default CMS Workflow

One TM and one TB per language pair

Translation (memoQ)

2022/462/#1

Select Provider

Select Dates

Open

2 as Proofread...

022/462/#3

Select Provider

Select Dates

Open

Open

Start 0 Job(s)

Jobs ready to be started: 0

Started: 0 of 1

Before starting, you need to:

- ✓ Select client
- ✓ Select specialisation
- ✓ Select process
- ✗ [Create project in memoQ](#)

Select Provider, Planned Start Date and Deadline before starting a job.

Project Confirmation

Edit & Send ▾

Status

Not Sent

Add Categories...



2022_453 - memoQ - memoQ online project

Online Project Statistics/Preparation Online Project Workflow View

Open Recent Launch Project Turn Off Autopilot Check Out Local Copy Import Update Package Deliver To Customer Portal Wrap Up Close Project Import Export Export Document As HTML Content Add CMS jobs Remove Open in WebTrans Deliver/Return Reimport X-Translate Reimport

Manage Project Document

Overview Target language - All languages -

Overview

Dashboard Project settings

Template name: One TM per client template (View)

Name and meta-information

	Project name	2022_453 - memoQ
Metadata	Project	2022_453 - memoQ
	Client	C000014
	Domain	General
	Subject	N/A
	Description	Project created by XTRF
Options	Record version history	Yes
	Publish on a server after creation	No
Languages	Source language	eng
	Target language(s)	ger, hun

Translations People History Reports

[← Back to selection](#)

O-2022-00202 memoQ project UTC +02:00 User & Project ▾

[Order details](#) [Job list](#) ▾[Project team](#) [Customer](#) [General](#) [Languages](#) [CAT interface](#) [Items](#) [Output](#) [Invoices](#) [Order complaint](#) [Order feedback](#) [Commission](#) [Tasks](#)

CAT interface

[CAT interface](#) [memoQManager](#) ▾ [CAT project templates](#) [Plunet integration](#) ▾

Project settings

memoQ project template

Big Beverage Marketing Blog - copy for Plunet test ▾

--- Please select ---

Big Beverage Marketing Blog

Big Beverage Marketing Blog - copy for Plunet test

Big Beverage Stakeholder Publicity

Change tracked documents - copy

Clone_for testing

Content connector - copy

Ready

Analysis

 Analysis

Word counts

memoQ

 Project TMs and corpora Homogeneity

Tag weight for words

0.0

Tag weight for characters

0.0

Price calculation

 Execute price calculation Overwrite existing prices Transfer quantities to jobs

Transfer to item/jo

Plunet 8.17.0 - 2022-04-04 HO

Today 0.00h (24.00)



Default ▾

Save

Two-row view Details Alerts Sort by

O-2022-00201 eng-US

Project Progress Users

Project data

Project: O-2022-00201 eng-US
Domain: O-2022-00201
Client: Chemical Industries Ltd.
Subject:

Created by/at

Created: 19/06/2022 17:37:46 | lengyelistvan
Project has been launched
Deadline: 19/06/2022 17:37:43
Last modified: 19/06/2022 18:32:11

Type

Project type:
online project (template: Rio Beverage Marketing Blog - conv for Plunet test)

Open Reassign

Admin - Licenses

Plunet license Plunet additional modules CAT license TradosStudioManager TransitManager TranslationWorkspaceManager AcrossManager memoQManager CatalystManager WorldServerManager GroupShareManager Other integration

memoQManager

Details on memoQ server

memoQ server:

memoQ API Key:

memoQWebTrans URL:

User name in memoQ: Default

Plunet Webservice Callback URL:

Check connection status **Synchronize resources**

Synchronize memoQ resources and users automatically

Project settings

Transfer project description from Plunet to memoQ

Transfer memoQ project from quote to order and rename it

Set members of project teams as project managers in memoQ

Show Asian characters separately in price lists

Download pre-translations

memoQ project field	Field type	Field value	Language
Domain	Flag	[ProjectNo]	
Subject	Flag		
Client	Flag	[CustomerName]	
Project	Flag	[ProjectNo] [Source] [Projectname]	

Move archivable projects to Recycle Bin

Default CAT project template: Please select

Project name in the CAT tool: [ProjectNo] [Source] [Projectname]

Filter settings

Active customers: Please select

0 translator pro license
0 free translator pro license

Resource

Assign/Extend ELM License

Resource

Please select

Select memoQ project to link with

Name	Client	Description	Source language	Target languages	Status	Created at ↴	
memoQ project	Pro Translations	This is a memoQ project.	eng	ger-DE, hun	Live	2022-06-21 18:42	<button>Link</button>
2022_453 - memoQ	C000014	Project created by XTRF	eng	ger, hun	Live	2022-06-19 17:44	<button>Link</button>
O-2022-00201 eng-US	Chemical Industries Ltd.		eng-US	hun, nor	Live	2022-06-19 17:37	<button>Link</button>
3269 test		T,R1	eng	hun	Live	2022-06-15 14:44	<button>Link</button>
Tr1	ss	T,R2	eng	hun	Live	2022-06-09 10:49	<button>Link</button>
TTT		T	eng	hun	Live	2022-06-09 09:42	<button>Link</button>
TTtt	ccc	T	eng	hun	Live	2022-06-09 09:41	<button>Link</button>
Package project	Client ID		eng	ger-DE, alb, ara, ben, cat, cze, dan, dut, gre, hin, jpn, kor	Live	2022-05-31 16:10	<button>Link</button>
2022-05-29-Lokalise-XLIFFdown-upload		T	eng	spa-ES	Live	2022-05-29 18:37	<button>Link</button>

How we see integrations at BeLazy?

Your BMS into memoQ integration is there in most BMSes.

Your memoQ into BMS is where we add value, think packages, content connector, customer's server, etc.

The BMS is mostly used for vendor selection and analysis storage, to create invoices, track vendor information, things that are not project-related but period-related.

Good processes + good reporting are key to growth. Can you mash the information necessary as per your requirements? Newest memoQ release offers this for server.

How about the memoQ connectivity?

memoQ's workflows (linguist assignment, server to server integration, subvendor groups) all have their pros and cons for subcontracting work, and all of them are hard to automate.

memoQ's WS API authenticates as admin, so clients are unlikely to give you access. Because of this, we built our integration on the WebTrans interface. Content connectors are hard to integrate too outside of memoQ.

Subvendor assignment has no API nor are available on WebTrans.

Automated actions are amazing, but it's hard to know what happened if not from email notifications.