Phrase

Phrase TMS - Quick Start Guide for Project Managers

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Introduction

This guide covers the basics of Phrase TMS for project managers (PM) and provides you with a step-by-step approach to use it.

We will explore key concepts such as project resources, how to create and configure a project, and how to assign and monitor linguistic tasks.

By the end of this guide, you will be equipped with the basic knowledge to explore other topics and more advanced features through Phrase Help Center documentation.

> **NOTE**
> UI features in Phrase TMS may vary according to your subscription plan. Please note that all screenshots and procedures in this guide refer to basic functionalities available for all Phrase TMS users, regardless of their specific plan.

Overview of the Project Manager Role

Project managers (PMs) are in charge of managing projects in Phrase TMS. They can create, modify, assign and manage project-related tasks and resources. Admins or other PM users create and handle PM user accounts.

The rights for PMs can be adjusted, allowing for limited access if necessary. Permissions can prevent PMs from handling projects and project resources created by others unless they are set as the owner, or they have relevant user rights.

The Project Manager User Interface

Receive email notification and log in to Phrase TMS

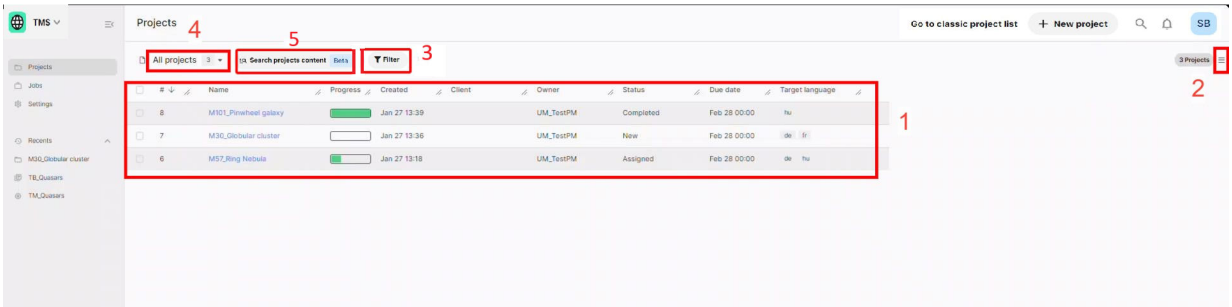
- *New users*
  An administrator will trigger an invitation email with login information. The message will contain your username and a link to reset your password. Once your new password is set, you can access Phrase TMS by providing your credentials at https://eu.phrase.com or https://us.phrase.com/.

  > **TIP**
  > If the link is expired, select **Forgot password?** on the login page to set your password.

- *Existing users*
  Log in to Phrase TMS by providing your credentials at https://eu.phrase.com or https://us.phrase.com to access the Projects page.

  > **NOTE**
  > If you have multiple Phrase TMS accounts, log in with username.
  >
  > If you are a member of different Phrase organizations, select **Switch organization** from the Dashboard menu to switch to the desired account.

Projects page overview



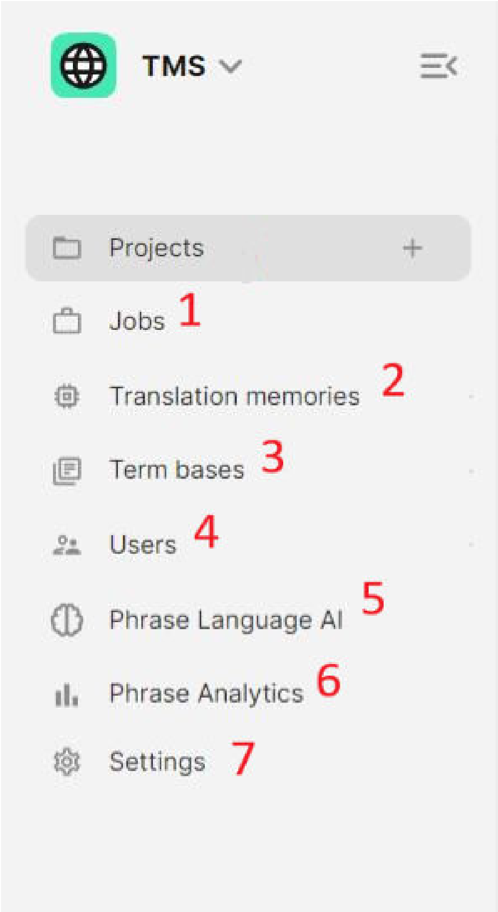
1. List of projects containing jobs you have access to with relevant details
2. Clickable settings icon to customize columns displayed in the list
3. Options to filter the projects view
4. Dropdown menu with options to create, save and manage your projects view based on available filters
5. Option to search for specific content across projects

Click on a project name in the list to open the relevant project details page, where you will find:

- Specific project information and metadata
- Jobs related to the project
- Available resources attached to the project (i.e. analyses, quotes, TMs, TBs, references)

TIP
You can also create resources and attach them from the project page.

Use the left-hand navigation menu to access other pages dedicated to project resources and settings:



1. The Jobs page lists all jobs you have access to across multiple projects.
2. The Translation memories page allows you to create and manage your TMs.
3. The Term bases page allows you to create and manage your TBs.
4. The Users page allows you to create and manage users in your organization.
5. The Phrase Language AI page allows you to create and manage machine translation (MT) profiles for your projects.
6. The Phrase Analytics page shows your project and job data in dashboards.
7. The Settings page lets you manage global settings (e.g. active languages, workflow steps, segmentation rules, integrations, automations, etc.) based on your permissions.

You can find more information about jobs, TMs, TBs, users and MT resources in the following chapters of this guide.

Useful articles on Phrase Help Center

You can find additional information in the following articles:

- Project Manager (TMS)
- Jobs
- Sharing (TMS) (in particular, see Error messages related to shared jobs)
- Projects
- Analytics Dashboards (TMS)

Set up Project Resources

Users

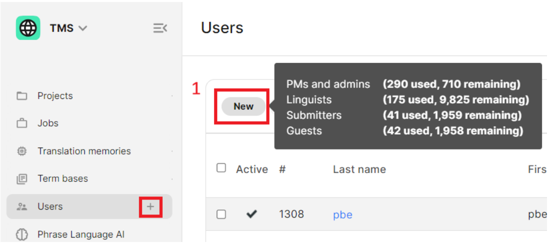
Select **Users** in the left-hand navigation menu to set up users you wish to grant access to TMS for different use cases. Typically, you will need Linguist users for translation/review tasks and additional PM users to collaborate with.

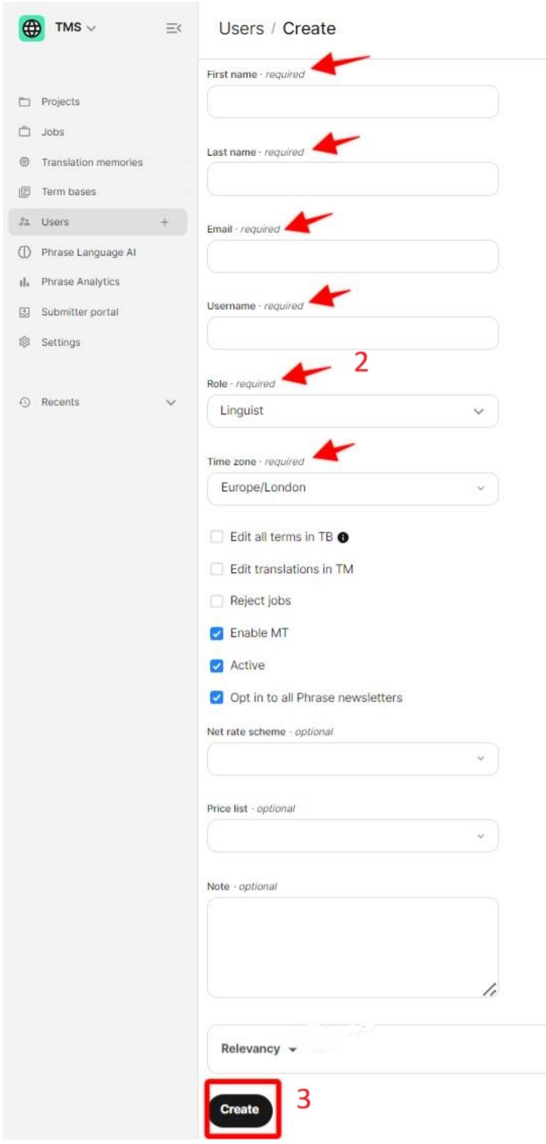
Create new users

You can either create users individually or import them in bulk.

- *Create a single user*

1. Click **New** or click the plus + icon beside Users in the left-hand navigation menu.
   Hover over the **New** button to see how many users are available in your subscription.
2. Fill in the required fields and select a role for the user:
   - Based on your selection, you can configure specific user rights by scrolling down the creation page.
   - For Linguist users, you can also set up Relevancy options. This information will be used to suggest the most relevant providers when assigning jobs.
3. Click **Create** to add the new user to the list in the Users page.





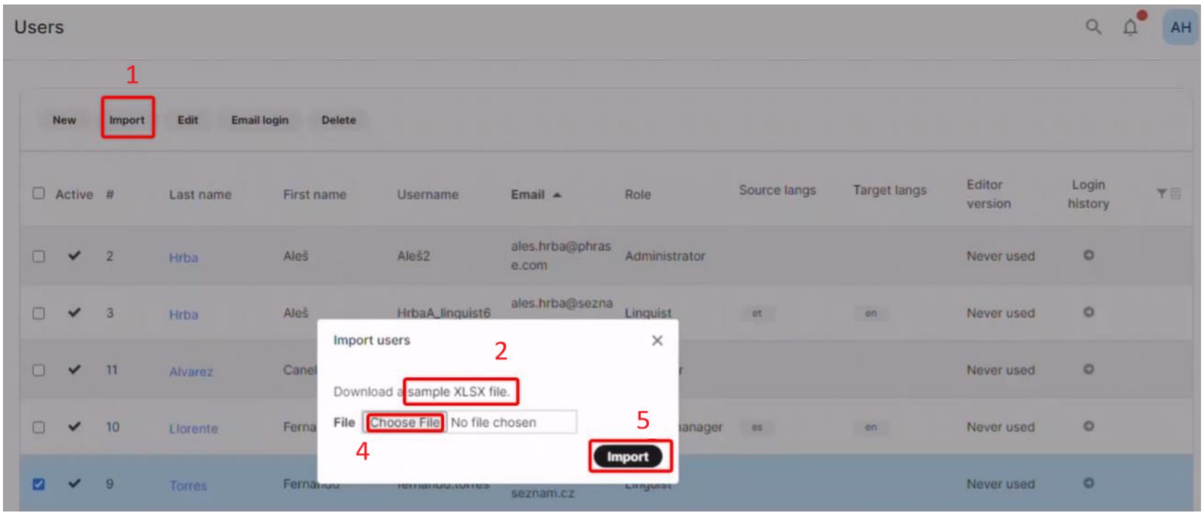
- *Import multiple users in bulk*

1. From the Users page, click **Import**.
   The Import users window opens.
2. Click **sample XLSX file** to download a pre-formatted .XLSX table.
3. Open the .XLSX file and enter the required information for each user you wish to import. If the *Username* is not immediately available, you can add it manually by editing the imported user in the Users page.

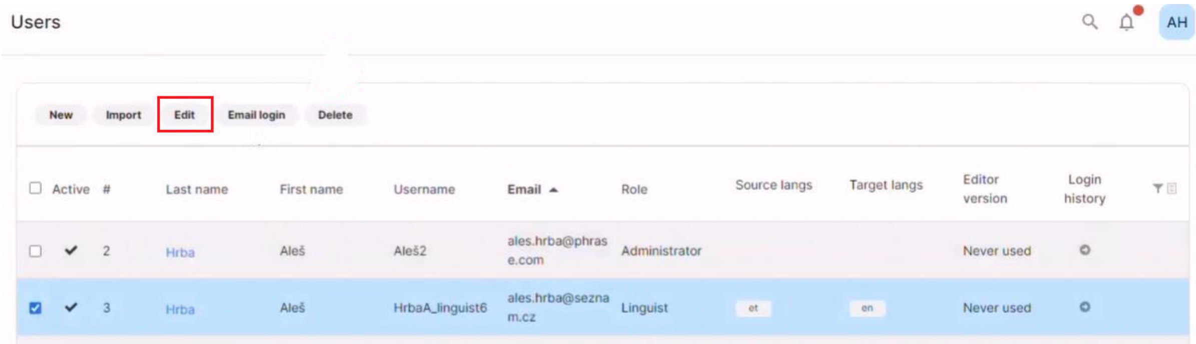
   IMPORTANT

   Usernames must be unique within the whole Phrase data center. If they are not, you will see an error message.

4. Save the .XLSX file and drag and drop it into the Import users window. Alternatively, click **Choose file** and select the file.
5. Click **Import** to add users from the .XLSX file to the Users page.



To edit user rights or any other user information, select the desired user and click **Edit** in the Users page.



Translation Memories (TMs)

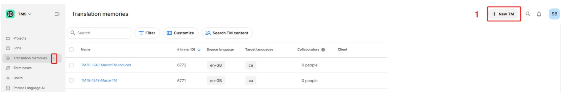
Select **Translation memories** in the left-hand navigation menu to set up TMs for your projects.

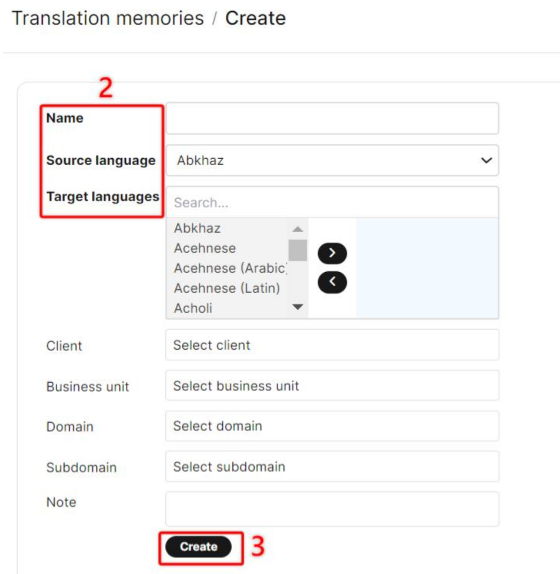
Create a new TM

1. Click **New TM** or click the plus icon beside Translation memories in the left-hand navigation menu.

> **NOTE**
> If you already have an existing project, you can directly create the TM from the Translation memories table of the project page.

2. Provide a name, a source language and the desired target languages for your TM. Optionally, you can provide business information and a note in the remaining fields.
3. Click **Create**.

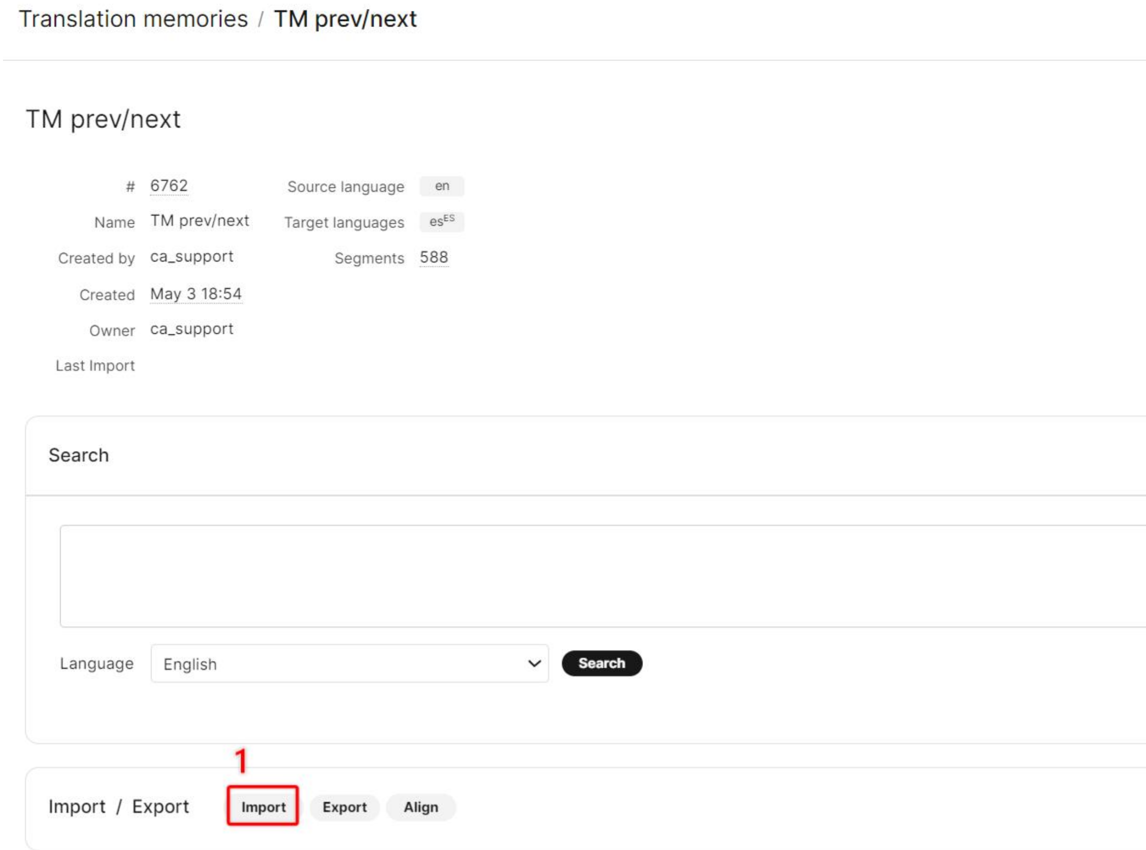




Edit the content of your TM

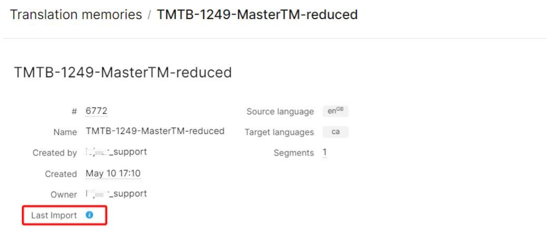
- *Import existing translations from other TMs*
  You can import existing translations in TMX/XLSX/MXLIFF/SDLXLIFF (WorldServer) file formats.

1. Click on the desired TM to open the TM details page, then click **Import**.



2. Click **Choose file** to add a file, or drag and drop the file to the window.
3. Optionally, select one of the available import options based on your needs.
4. Click **Import** and look at the icon next to the Last import field to ensure the import was completed successfully:

- Hover over to see the number of processed segments.
- If there is an error, you will see the icon. Hover over the warning for error details.

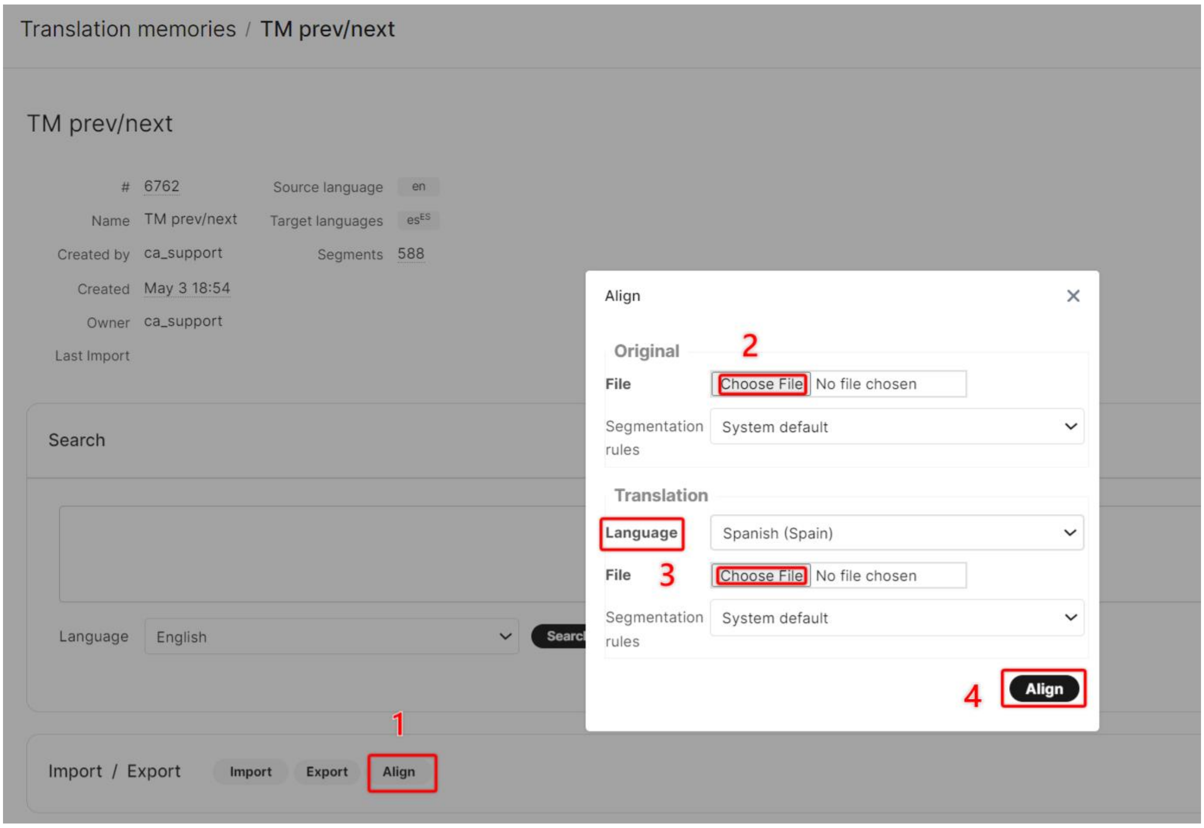


- *Align translations created outside of Phrase TMS*
  You can align previously translated texts if both the source and target languages are in the same file format (supported by Phrase TMS).

1. Click on the desired TM to open the TM details page, then click **Align** and select **1 source + 1 target file**.

> **NOTE**
> You can also align files in batches using zipped folders by selecting **Align/Multi-ple files**.

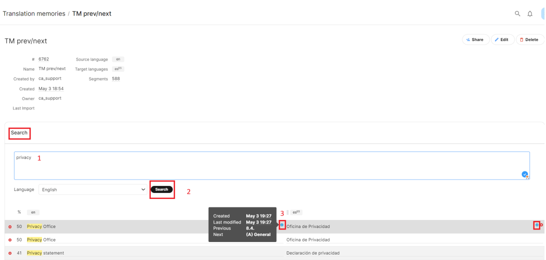
2. Click **Choose file** to upload the original file in the source language.
3. Select the Language of the translated file from the dropdown list and click **Choose file** to upload the translated file.
4. Click **Align** to download an .XLSX file with your aligned segments.
5. Open the .XLSX to check its correctness and make edits as needed. Then, import the .XLSX to your TM by following the same procedure described in the previous section.

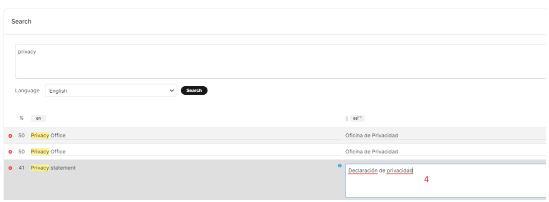


- *Edit segments in your TM*

1. Click on the desired TM to open the TM details page, then search for a specific segment by entering text in the Search field.
   - Search by source language is set by default.
   - Wildcards are supported.
2. Select the desired target language from the dropdown list and click **Search** to view the results in the pane below.
3. Hover over ⓘ to see details and metadata of the translation unit.
4. Double-click on a segment to edit its text. Simply click outside the editing field to save the changes.

> **CAUTION**
> Editing segments within a TM is permanent. There is no undo function. If you need to perform major maintenance, export the TM in .TMX format and save it in .ZIP format as a backup.





Term Bases (TBs)

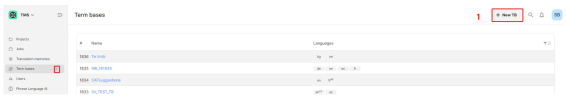
Select **Term bases** in the left-hand navigation menu to set up TBs for your projects.

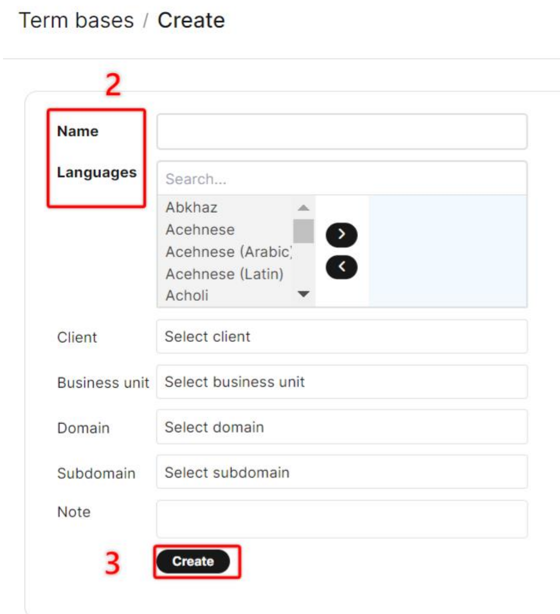
Create a new TB

1. Click **New TB** or click the plus + icon beside Term bases in the left-hand navigation menu.

> **NOTE**
> If you already have an existing project, you can directly create the TB from the Term bases table of the project page.

2. Provide a Name and select Languages for your TB. Optionally, you can provide business information and a note in the remaining fields.
3. Click **Create**.

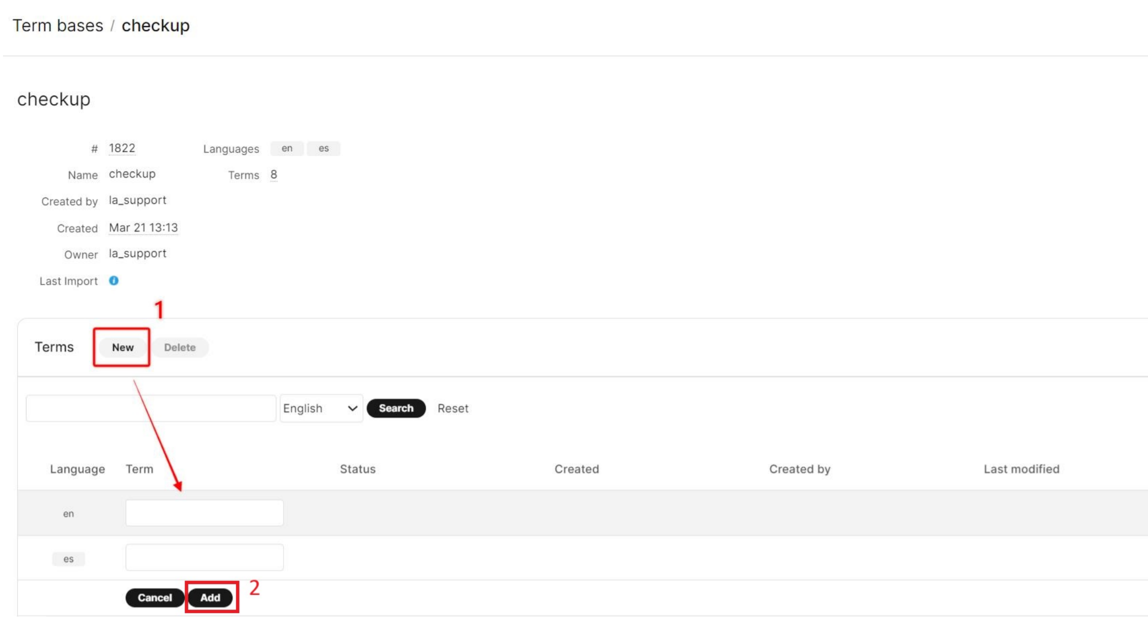




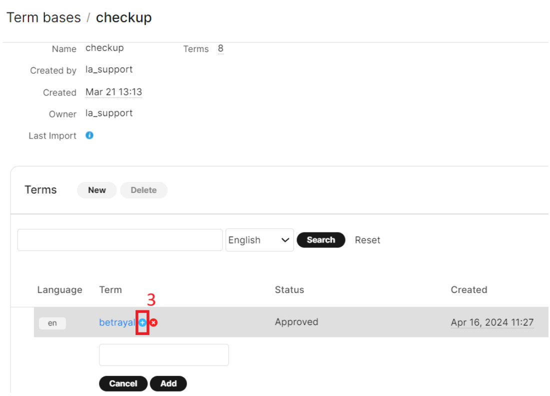
Edit your TB

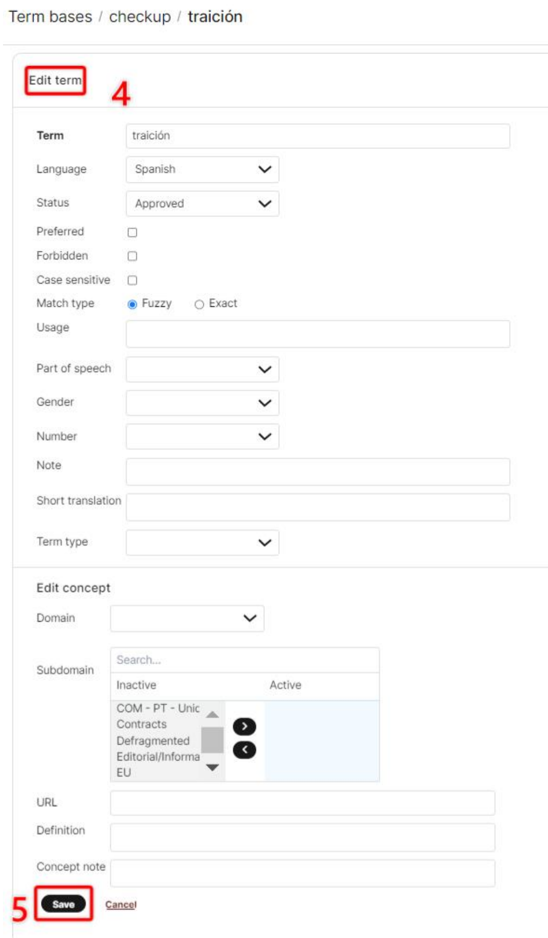
- *Add a new term*

  1. Click on the desired TB to open the TB details page, then click **New**.
     The new term pane opens with empty fields for all languages in the term base.
  2. Fill in terms for each language in the new term pane and click **Add** (or press **Enter**).



3. If you need to add synonyms, click the plus icon next to the desired term and repeat step 2.
4. Select any of the newly added terms to edit their attributes in the Edit term page.
5. Click **Save** to apply the changes.



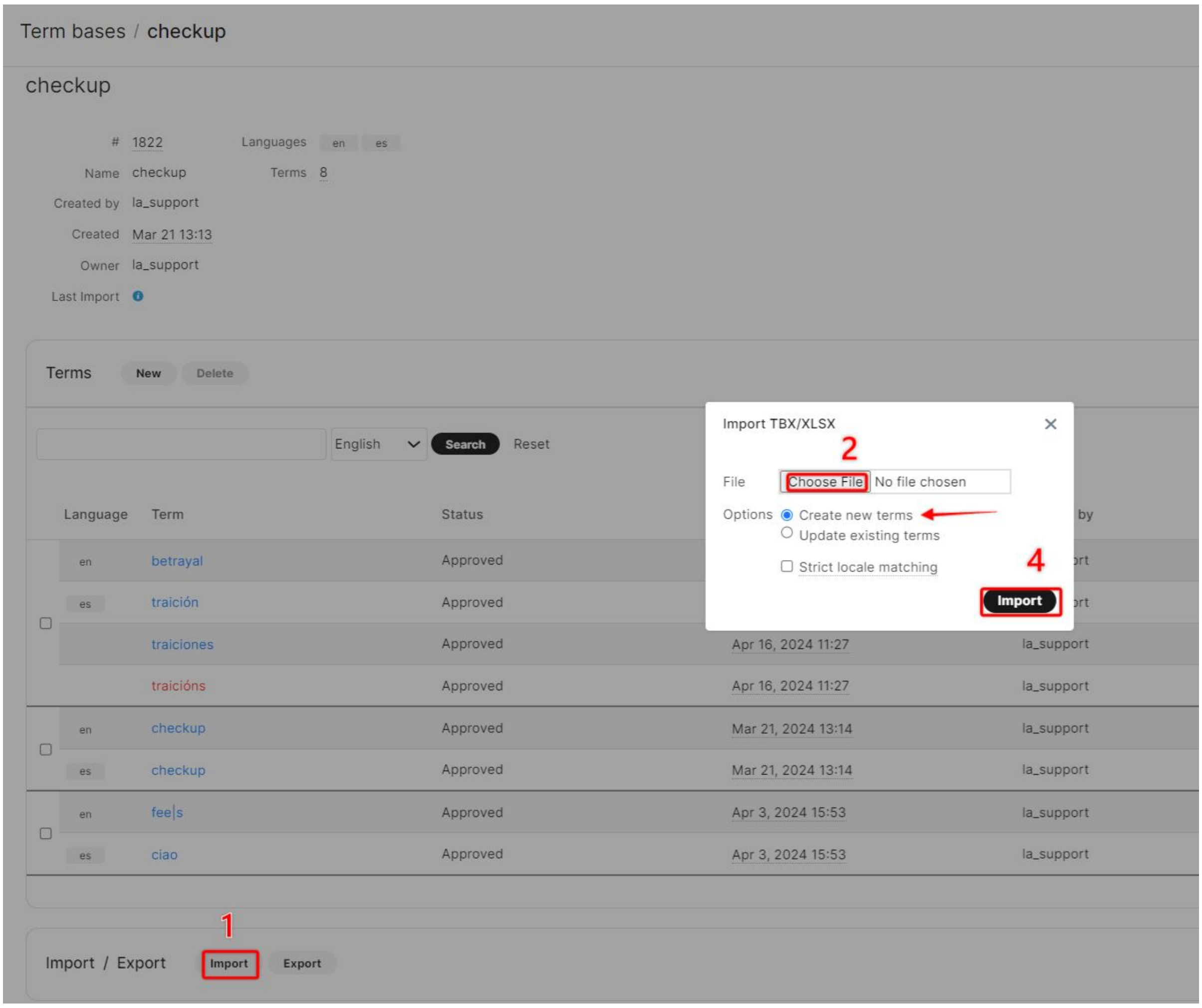


- *Import new terms*

  You can add multiple terms at once by importing terminology files in .XLSX or .TBX formats.

1. Click on the desired TB to open the TB details page, then click **Import**.

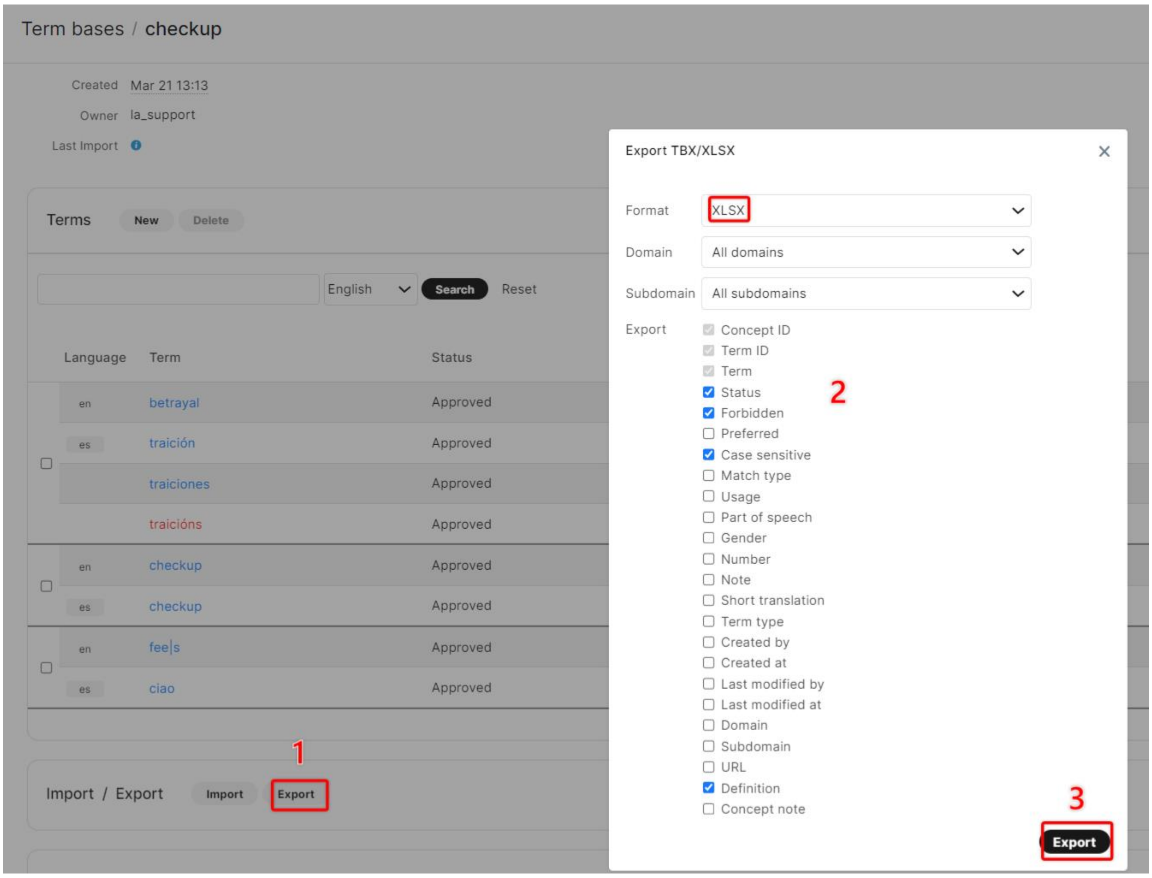
2. Click **Choose file** to add a file, or drag and drop the file to the window.
    - For .XLSX files, ensure your file has been prepared correctly according to these instructions.
3. Select **Create new terms** and optionally enable the available import options.
4. Click **Import** to update the list of terms in your TB.



- *Edit existing terms in bulk*

  To edit multiple terms of your TB at once, you need to export them to an .XLSX file and apply changes within the .XLSX before reimporting the modified terms in your TB.

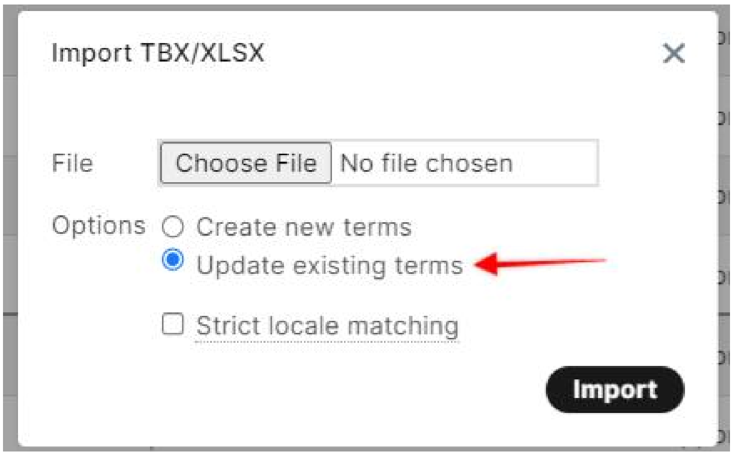
1. Click on the desired TB to open the TB details page, then click **Export**.
2. Select **XLSX** as the Format and the term attributes you wish to export.
3. Click **Export** to download the .XLSX file.



4. Open the .XLSX file and rewrite existing terms in the column for the given language to update them.

> **WARNING**
> Do not delete CID or TID information when modifying the .XLSX file.

5. Save the .XLSX file and import it back by following the same procedure described in the previous section. Remember to select **Update existing terms** when uploading your .XLSX file.



Machine Translation

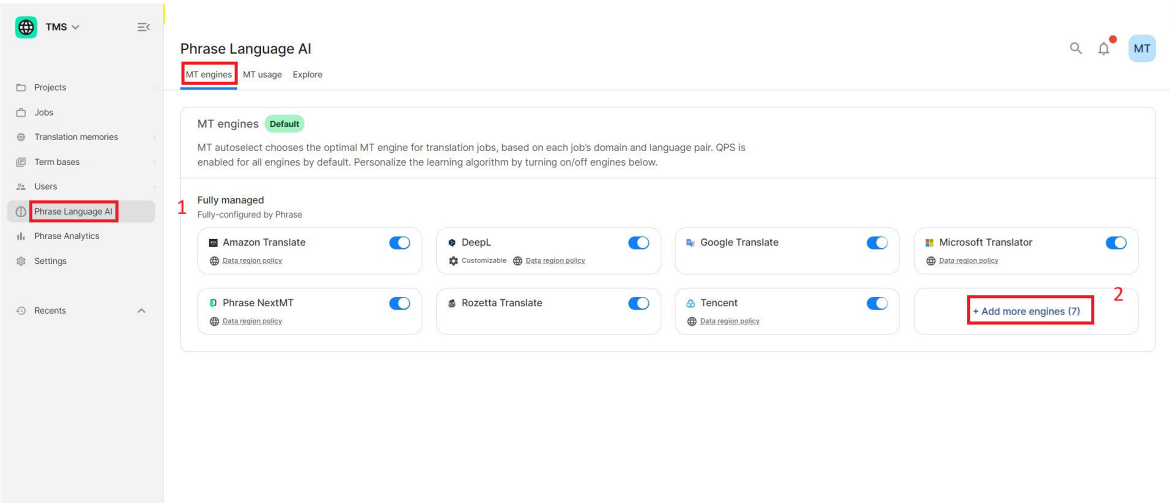
Configure your MT engines in Phrase Language AI

Phrase Language AI is a machine translation (MT) hub that leverages AI-powered MT autoselect to find the optimal engine for each translation job based on its domain and language pair. You can choose from 7 fully-managed MT engines, or add other engines via API key if you have a subscription directly with the given MT provider.

> **IMPORTANT**
> The following procedure provides basic instructions that are valid for all Phrase TMS subscription plans. Starting from *Team/Professional* plan, your UI will also include MT profiles to enable different sets of MT engines for multiple projects.

To configure MT engines in Phrase Language AI, follow these steps:

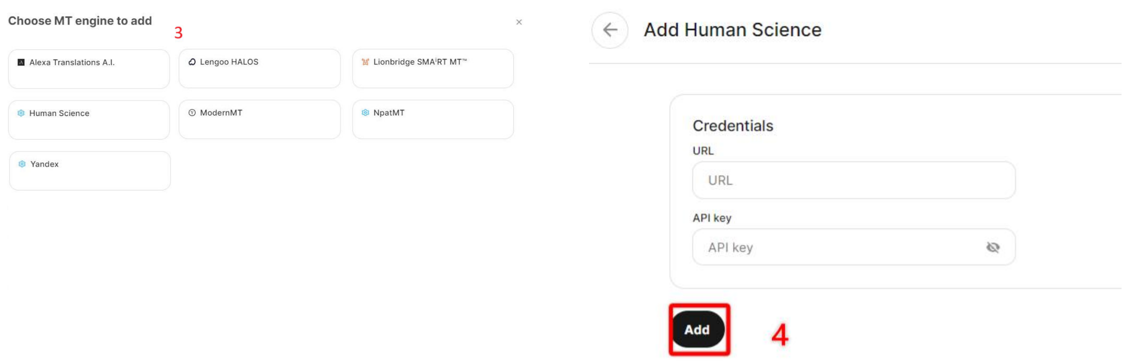
1. Select **Phrase Language AI** in the left-hand navigation menu and toggle on the desired fully-managed engines in the MT engines tab.
2. Optionally, click **+ Add more engines** to configure your manually managed engines via API key.



3. Select the desired MT engine among those available, then provide relevant credentials and/or API key based on your selection.

> **NOTE**
> Available MT engines may vary according to your subscription plan.

4. Click **Add** to add the MT engine to your Phrase Language AI configuration.



Useful articles on Phrase Help Center

You can find additional information in the following articles:

- Phrase User Management
- Translation Memories (TMS)
- Term Bases (TMS)
- Phrase Language AI (TMS)

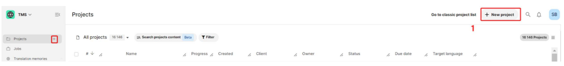
Create and Prepare Projects

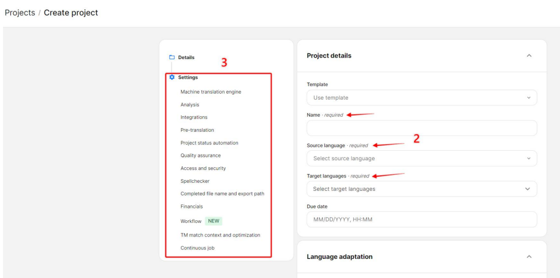
Create a New Project

The following instructions will show you how to create a project from scratch and configure some basic settings to start working in Phrase TMS.

> **IMPORTANT**
> Project settings have a number of different sections and options that are not fully covered in this guide. Please refer to the Phrase Help Center to get a thorough knowledge of all available settings.

1. Click the plus + icon beside Projects in the left-hand navigation menu, or access the Projects page and click **New project**.
2. In the creation wizard, provide the required project details: name, source and target languages.
3. Use the Settings menu of the creation wizard to navigate and configure additional project settings.





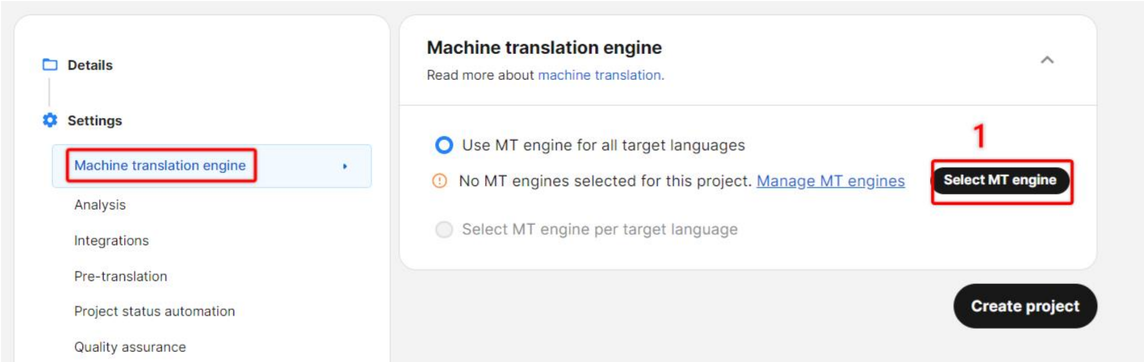
Machine translation settings

> **IMPORTANT**
> The following procedure provides basic instructions that are valid for all Phrase TMS subscription plans. Starting from *Team/Professional* plan, your UI will also include MT profiles to enable different sets of MT engines for multiple projects.

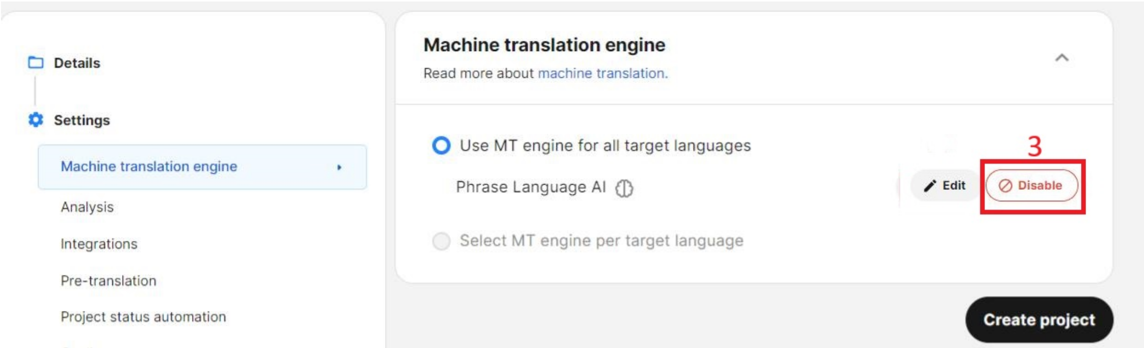
Click **Machine translation engine** to select the MT engines for your target languages. You will see two available options:

- Use MT engine for all target languages
  This option allows you to use your Phrase Language AI configuration for all the target languages in your project:

  1. Click **Select MT engine** and select your *Phrase Language AI* configuration.

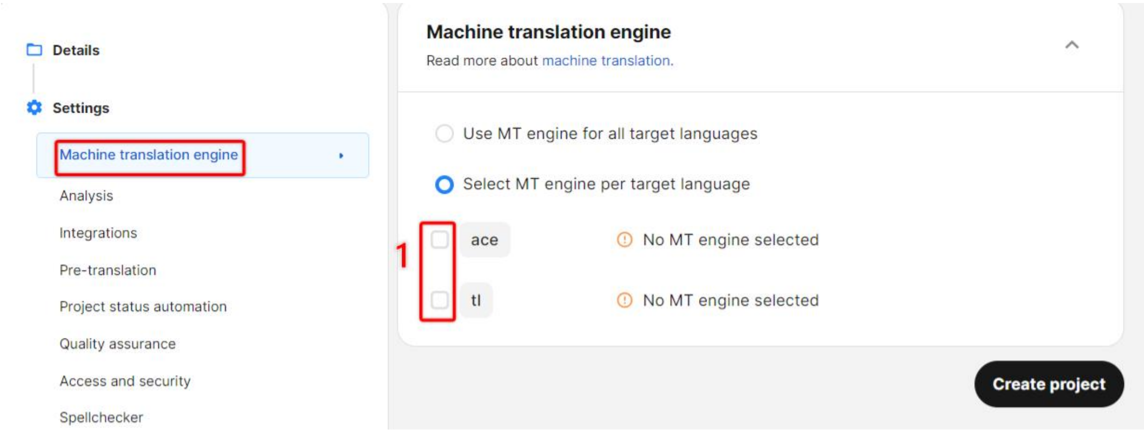


2. Click **Use selected MT engine**.
3. If necessary, you can click **Disable** to disable MT engines usage in your project settings.



- Select MT engine per target language
  This option allows you to use your Phrase Language AI configuration only for specific target languag-es in your project:

1. Select a target language and pick your *Phrase Language AI* configuration.



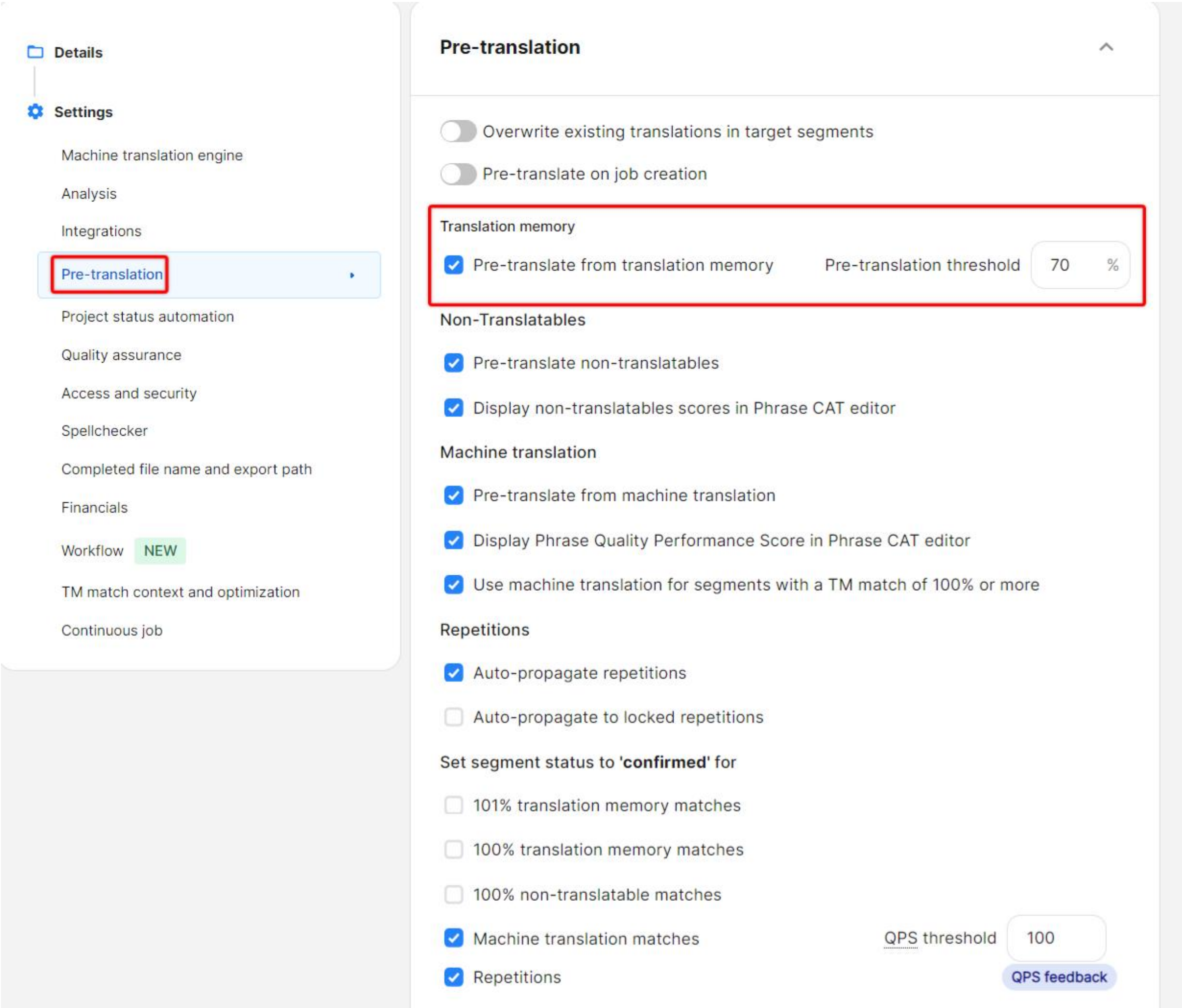
2. Click **Use selected MT engine**.

Pre-translation settings

Select **Pre-translation** to configure how to pre-translate your files using non-translatables, TM and/or MT matches before assigning them to a provider.

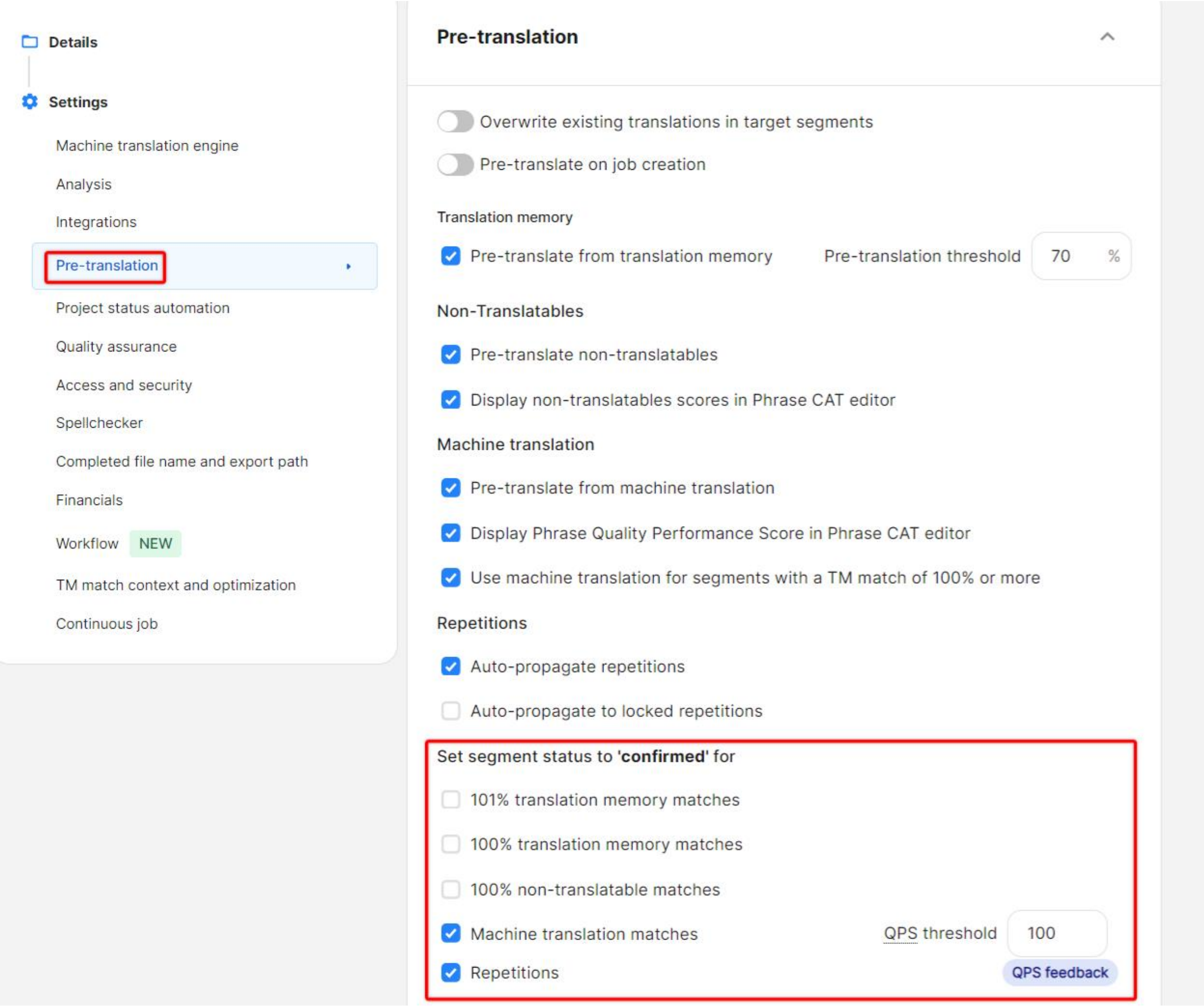
Scroll through all the options to define your preferred combination of settings among those available. If you enable pre-translation from TM matches, define the most appropriate Pre-translation threshold based on your needs:

- E.g. If you set the threshold to 70%, only 70% and higher matches will be applied to the target segments.
- The threshold only affects matches applied to the empty segments before you start your work. It does not limit the TM you are using for a job.



You can also enable one of the options under the Set segment status to **confirmed** for section to ensure pre-translated segments are automatically confirmed.

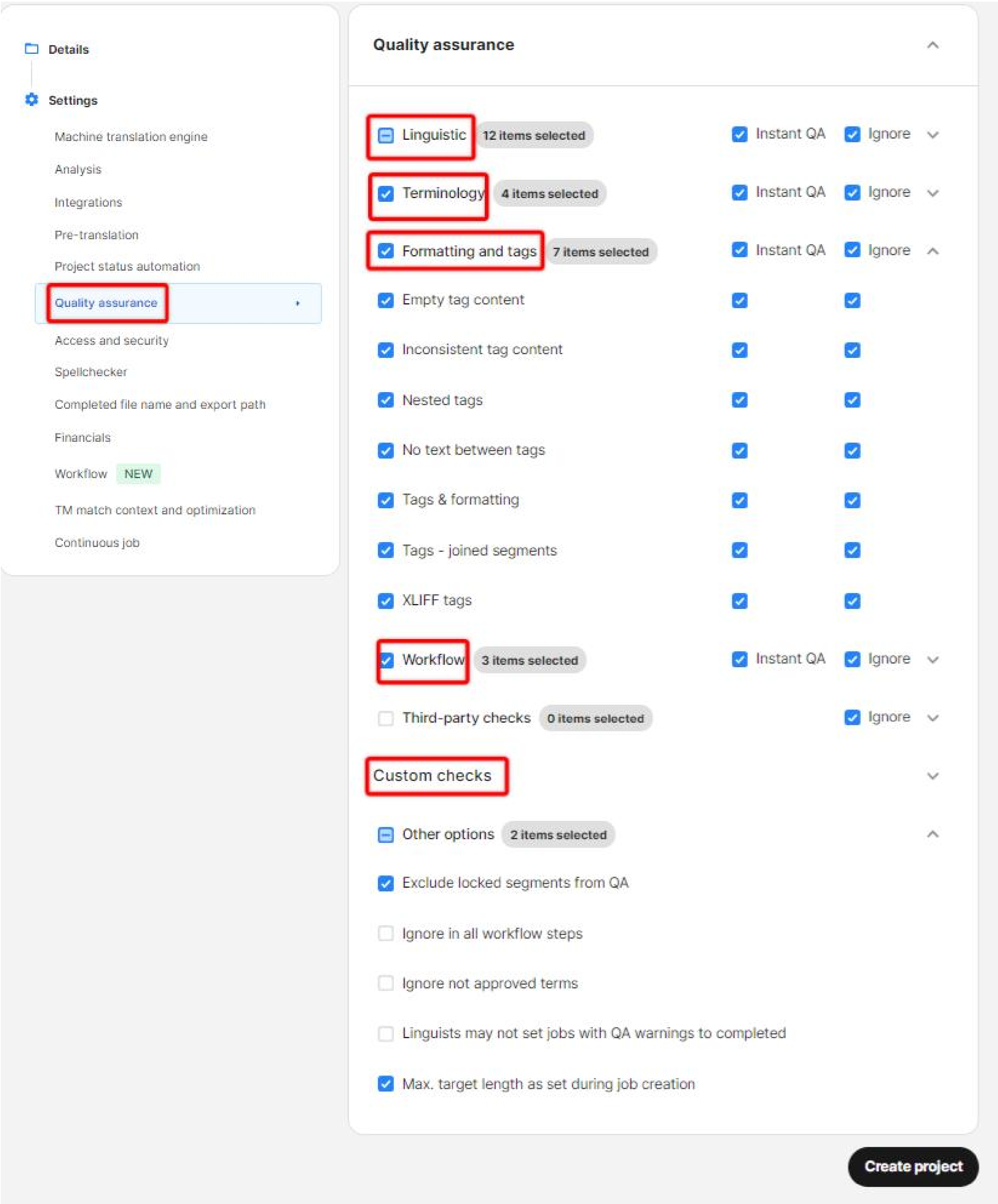
In this case, choose the most appropriate threshold by selecting the desired option(s) or by entering a specific QPS threshold for MT matches.



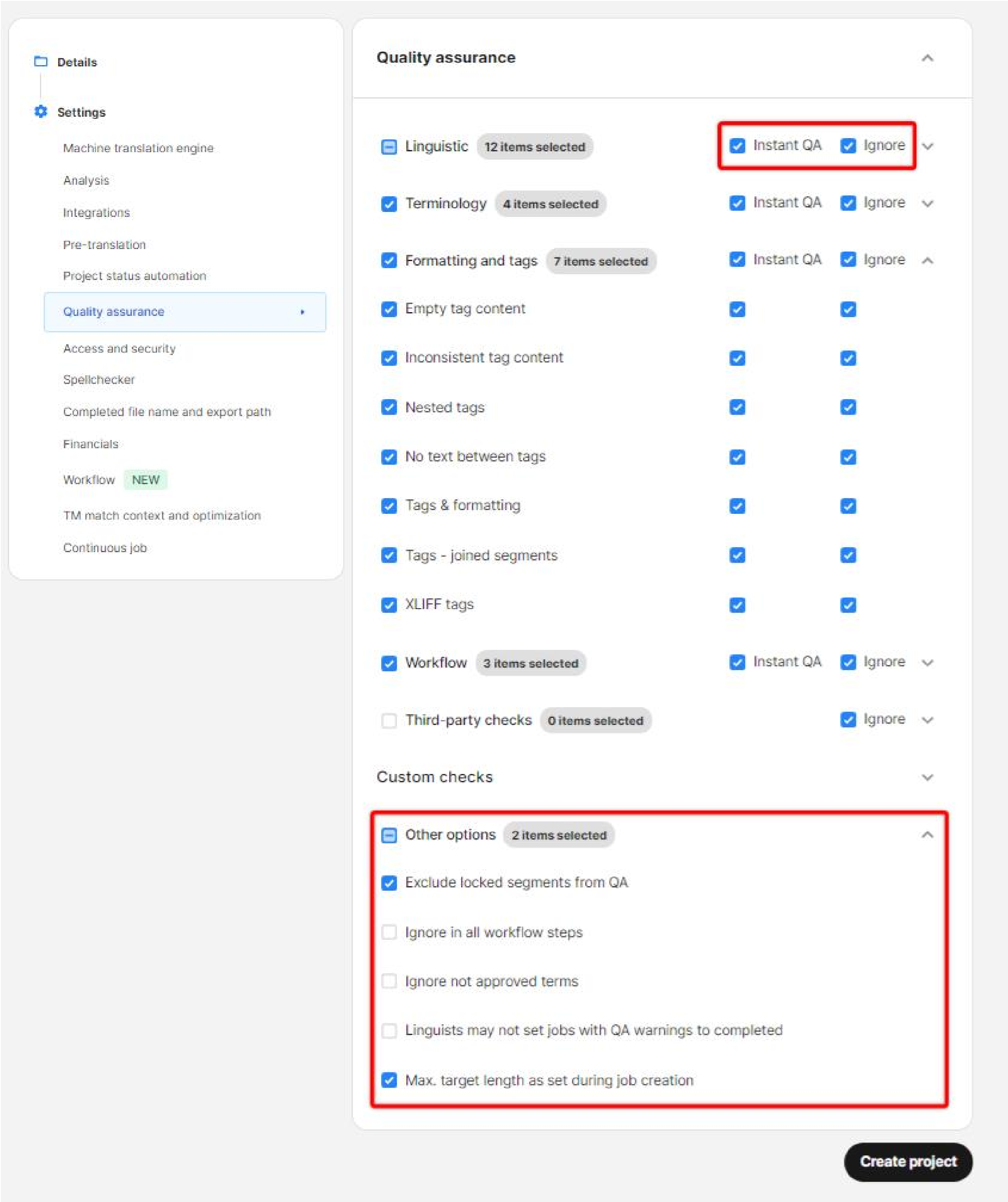
Quality assurance settings

Select **Quality assurance** to configure the automatic QA checks you want to set up in your project to help providers detect common mistakes in their translations (e.g. missing tags, additional spaces, missing terms, etc.).

You will see a list of predefined QA checks that can be enabled in your project. Additionally, you can define your own Custom checks using regular expressions:



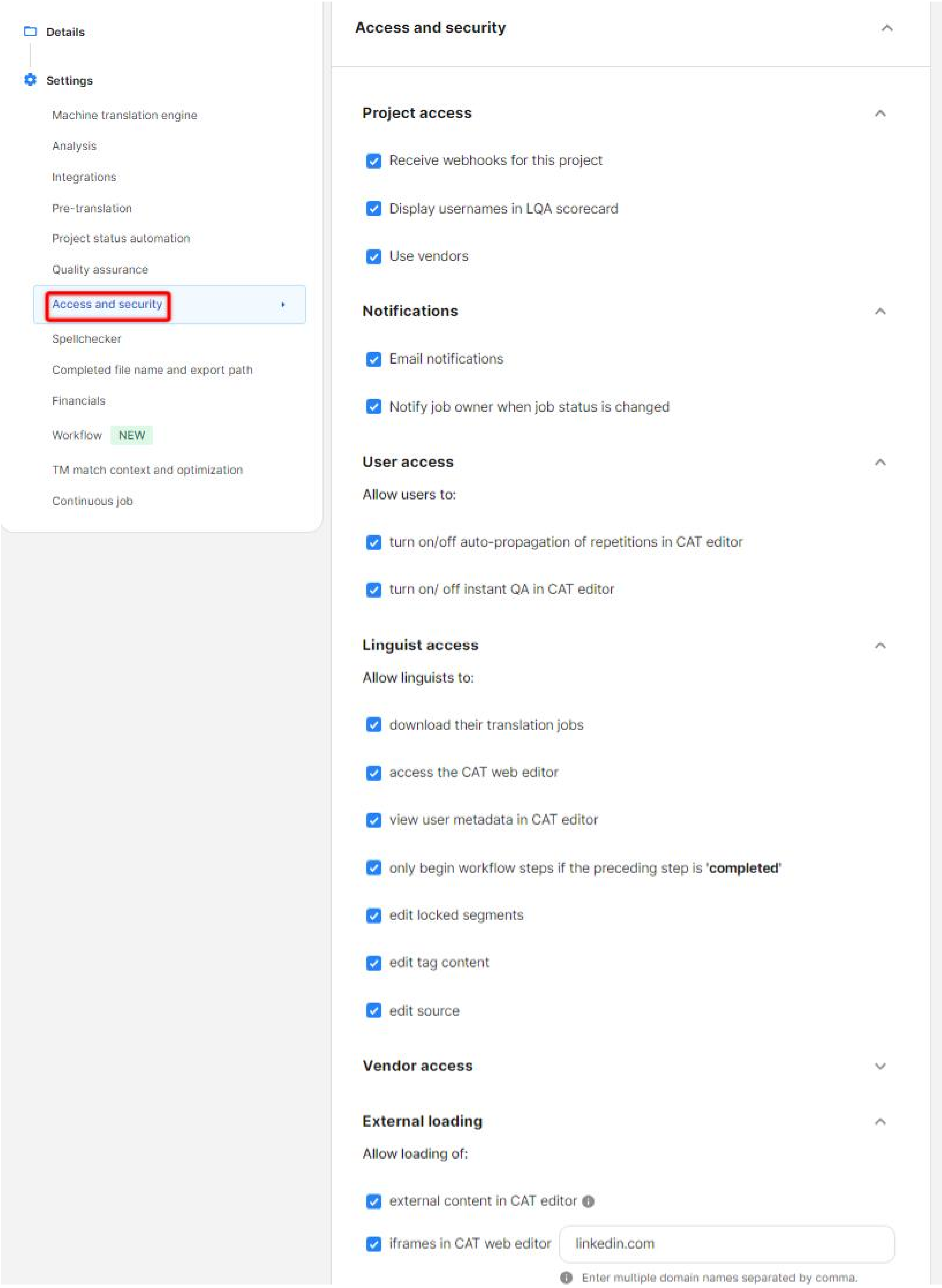
You can also decide whether a provider has to resolve or can ignore issues detected by QA checks in your project, or enforce **Instant QA** to run the desired checks on a segment as soon as it is confirmed. Use the available options under Other options to further configure QA settings for your projects.



Access and security settings

Select **Access and security** to configure what parts or features of a project are accessible to providers. You can also set up specific notification settings for your project.

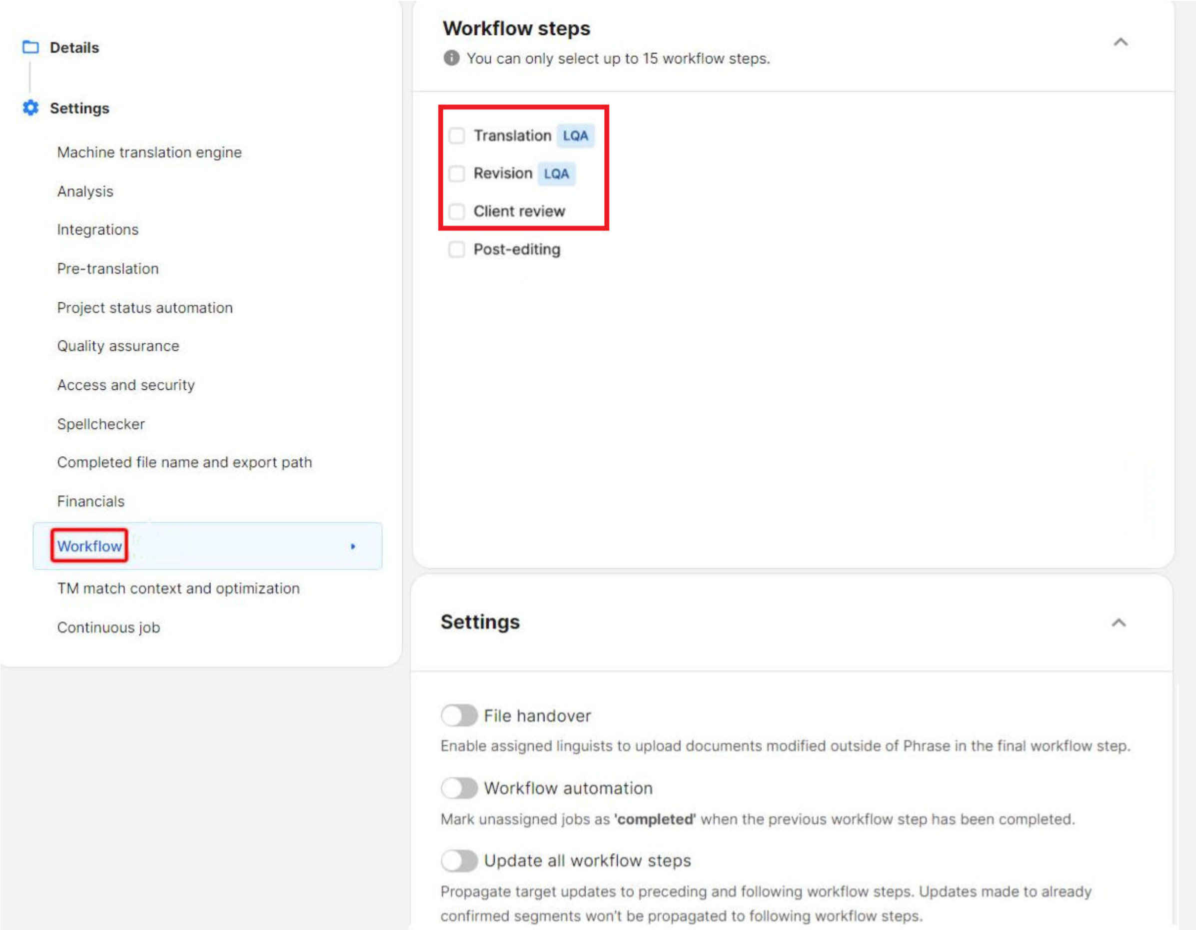
Enable the available options according to your needs:



Workflow settings

Select **Workflow** to choose the Workflow steps that you want to add to your project based on your translation process:

- *Translation*, *Revision* and *Client review* steps are pre-defined, but they are not pre-selected.



You can also create custom workflow steps from the Settings page of Phrase TMS. Projects can contain up to 15 workflow steps.

NOTE

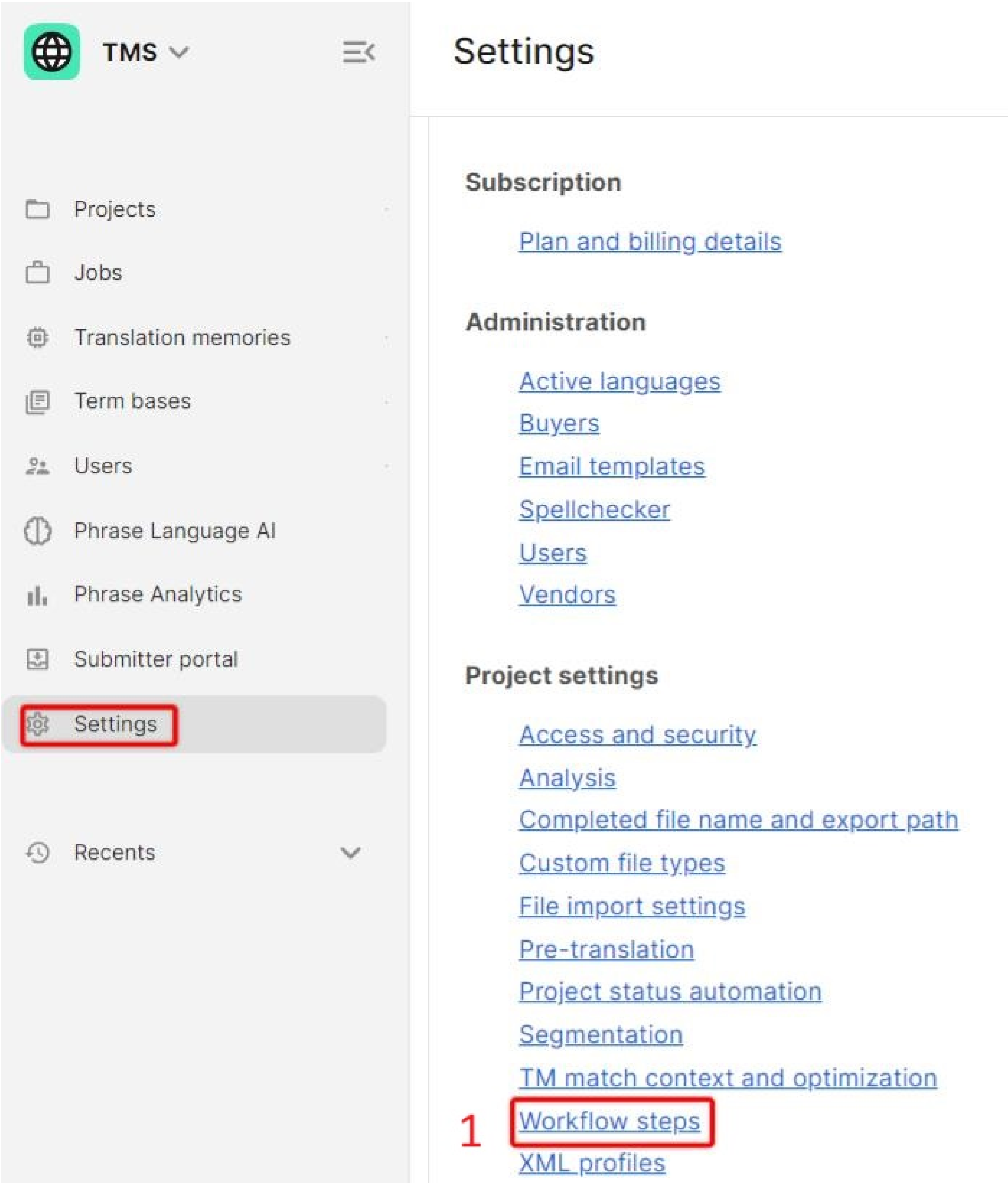
Only workflow steps with a higher hierarchical order can be added to a project with existing workflow steps.

If your project is initially created with steps no. 1, 2 and 4, you could add a 5th step but not a 3rd step.

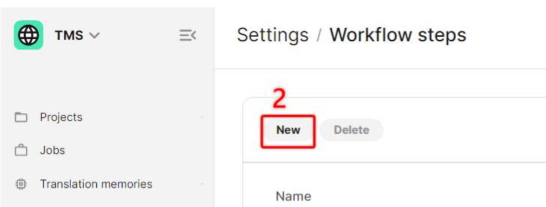
You cannot remove a workflow step once you add it to a project.

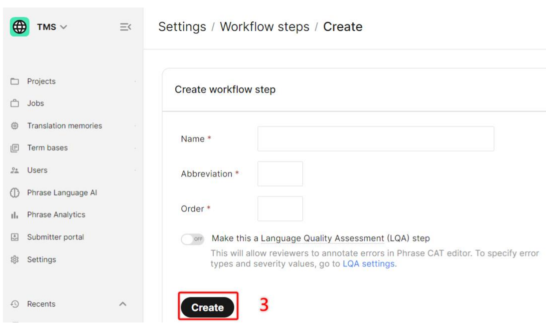
To set up your custom workflow steps, follow these steps:

1. From the Settings page, scroll down to the Project settings section and click on **Workflow steps**.



2. Click **New**.
3. Provide a name, abbreviation and order position for your step, then click **Create**.

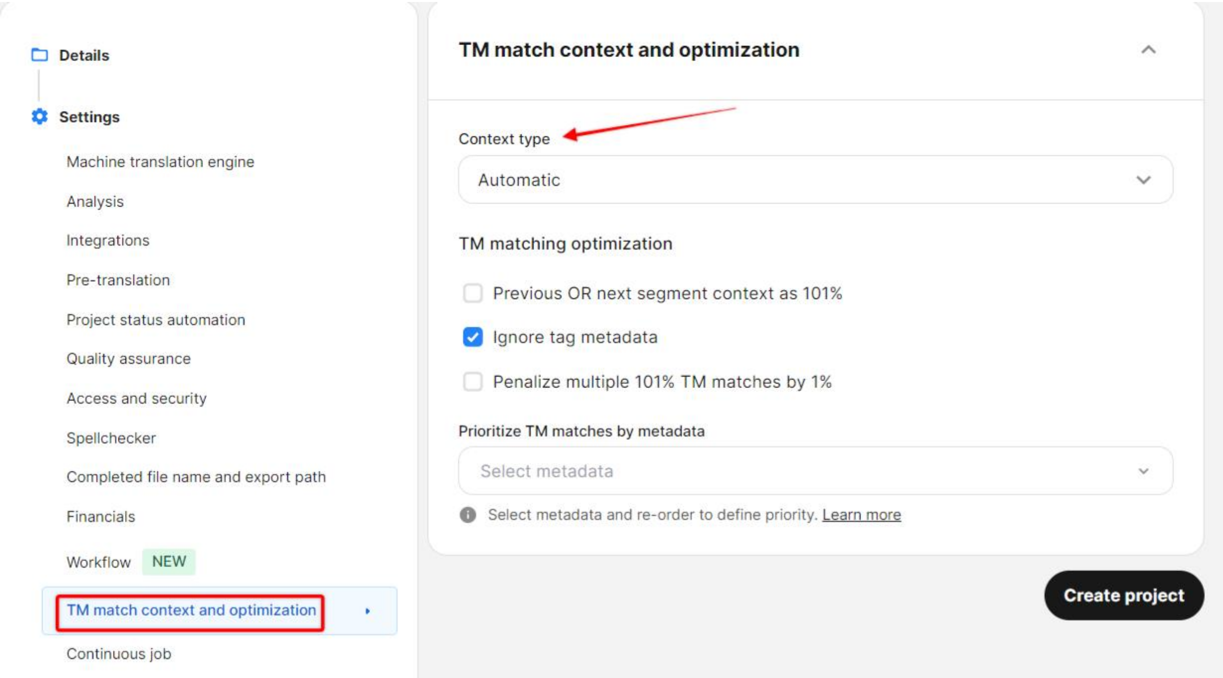




TM match settings

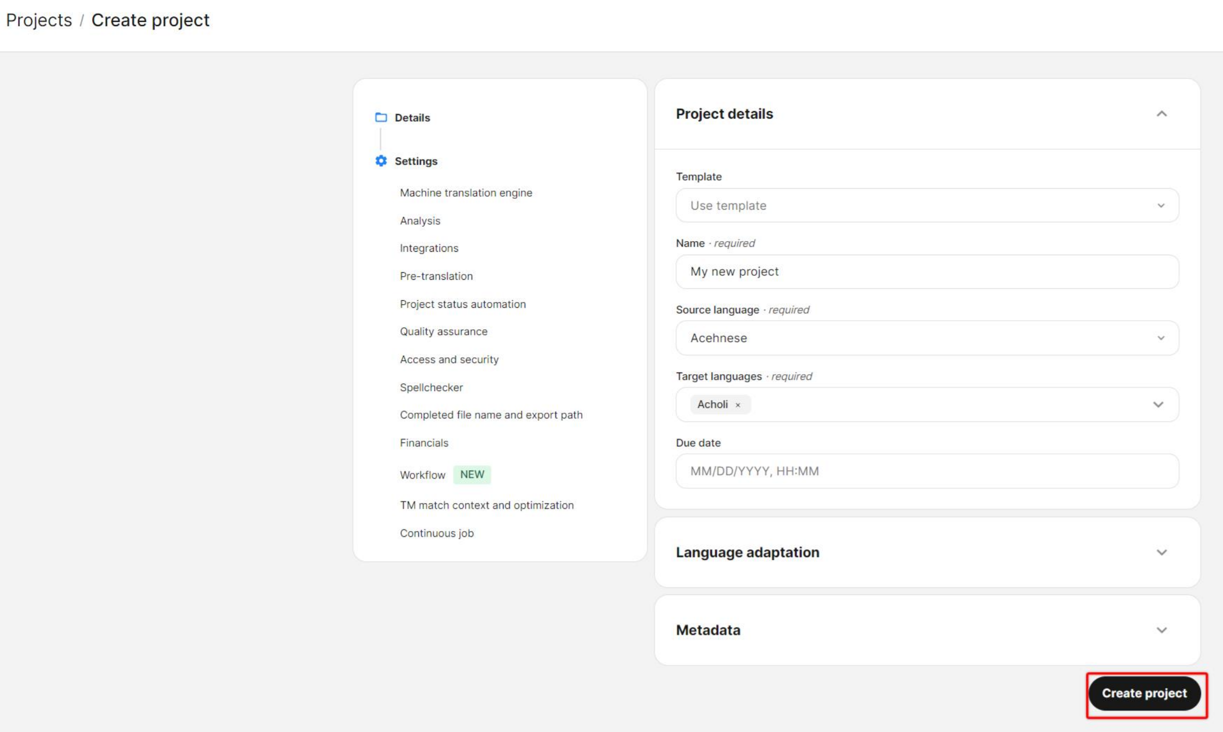
Select **TM match context and optimization** to specify how the TM attached to your project defines context.

Choose one of the option available in the Context type dropdown based on your needs. If you select **Automatic**, the context type will be selected automatically based on the file type.



Save your project settings

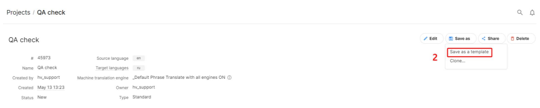
Once you're done configuring all the desired settings, you can click **Create project** to exit the creation wizard and start working with your newly created project.

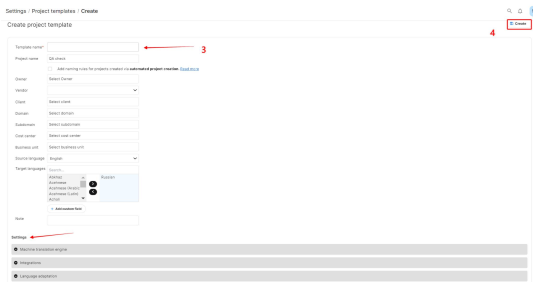


You can also save the newly created project as a *project template* to speed up the creation of your next projects. Project templates help you preserve your frequently used configurations and reduce errors.

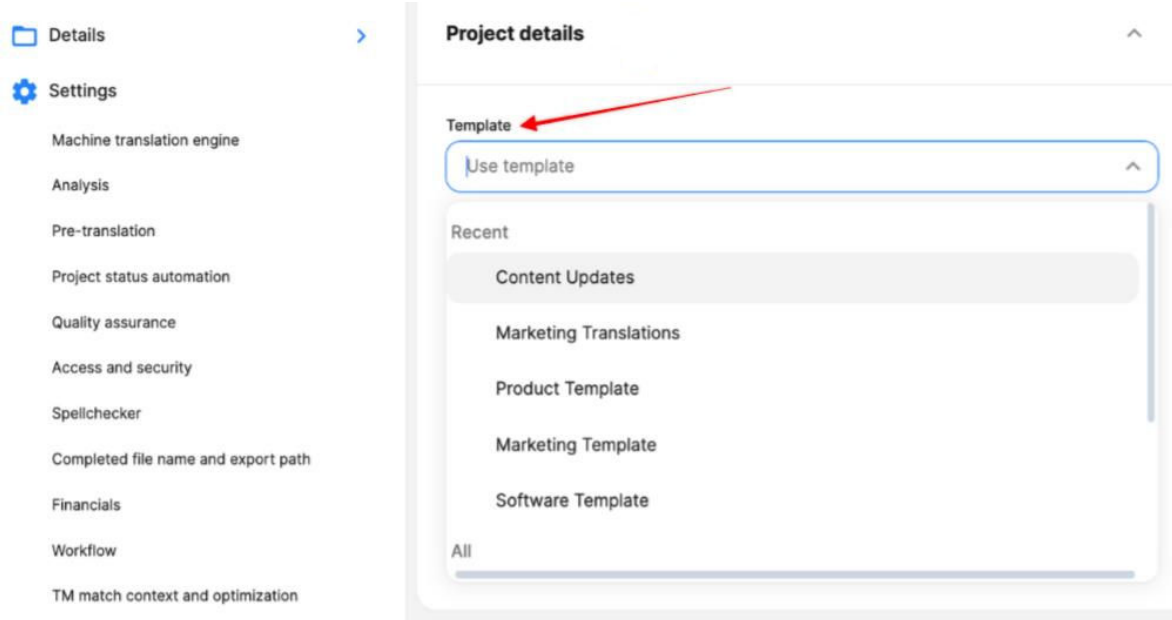
To create the project template, follow these steps:

1. Open your existing project.
2. Click **Save as** and select Save as a template.
3. Provide a name and adjust the project settings as you prefer.
4. Click **Create**.

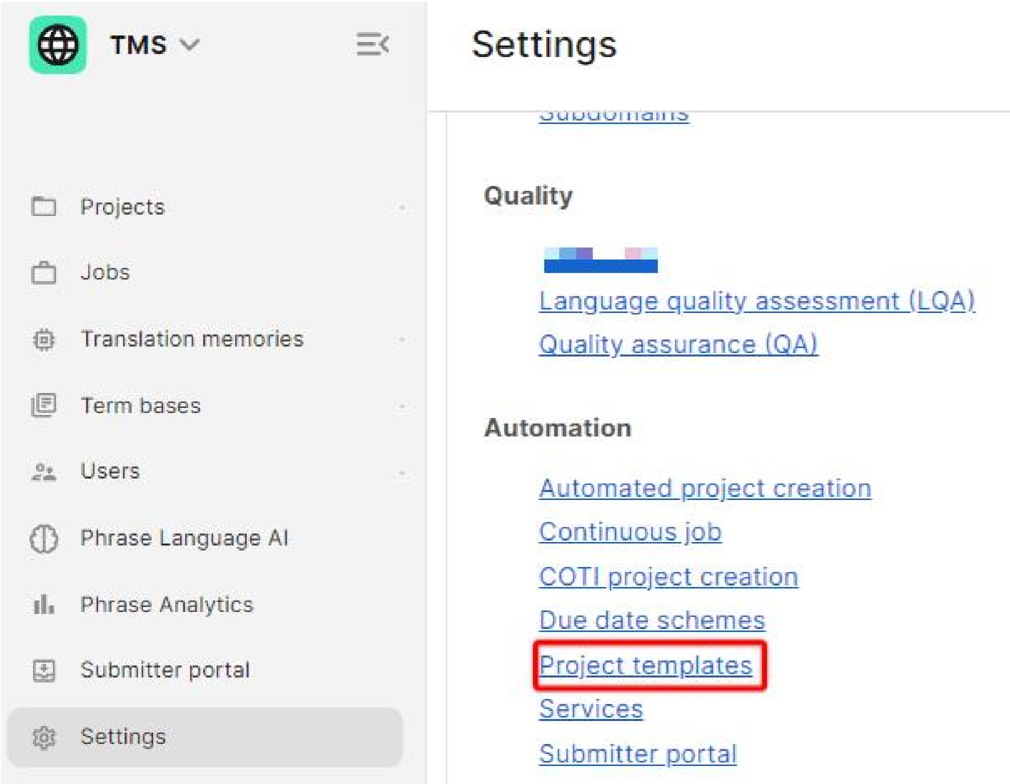




The template is added to the list of Project templates. You can now use it to create your next projects in the project creation wizard.



To edit the settings and project resources assigned to your project template, click on its name in the Project templates page. Make the required changes and click **Save**.

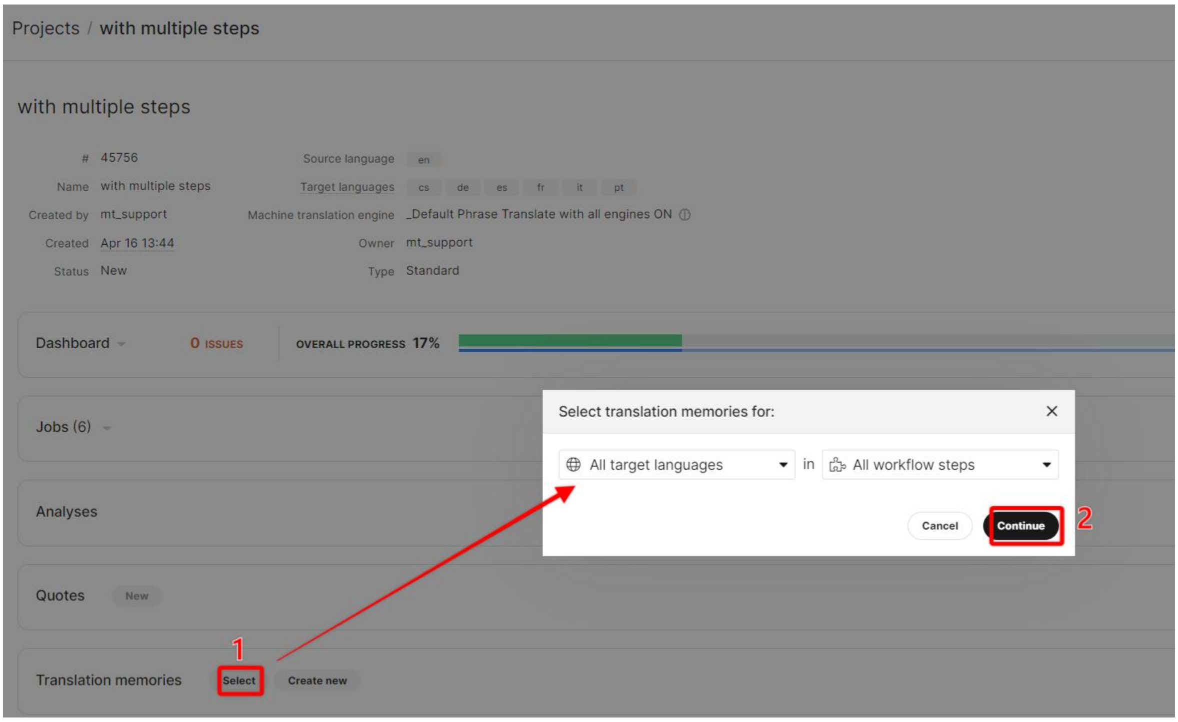


Assign Project Resources

Translation memories

You can configure TMs for each workflow step and target language of your project. In the Projects page, click on your project to open it, then follow these steps to assign TMs:

1. From the project page, scroll down to the Translation memories table and click **Select**.
   If the project has multiple target languages, the Select translation memories for: window opens (if there is only one target language, this step is skipped). Select **All target languages** or the desired target language from the dropdown list.
2. Specify if the TM is for all or individual workflow steps (if there is only one workflow step, this step is skipped). Click **Continue** to open the Translation memories page.



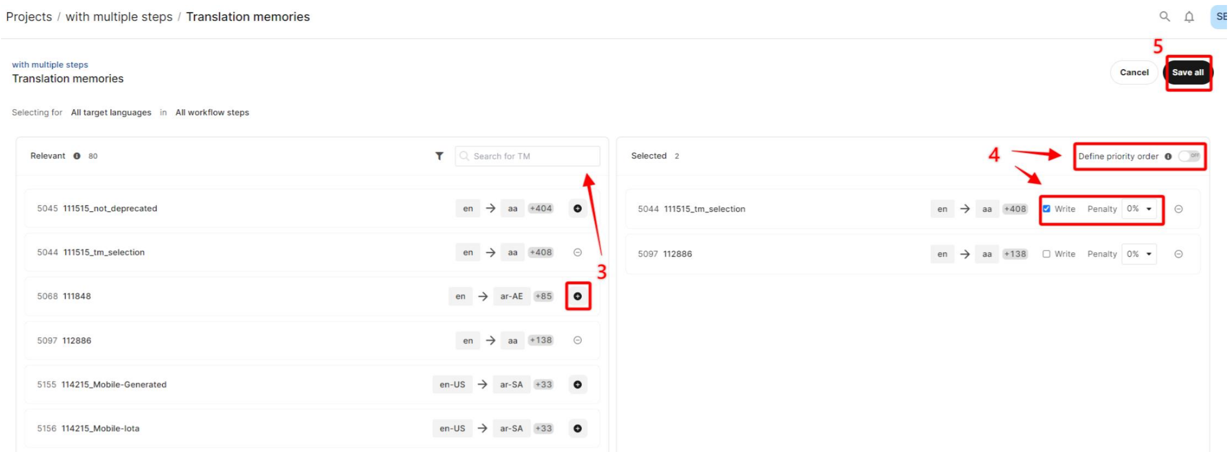
3. If necessary, filter the list of available TMs or search for the desired TM. Then, click the + icon to add TMs to the Selected table.

> **NOTE**
> You can only add up to 10 TMs to the project.

4. Set options for selected TM(s):
   - Enable **Write** if you want to save confirmed segments in the TM.

     > **NOTE**
     > You can have up to two Write TMs per language and workflow step in a project.

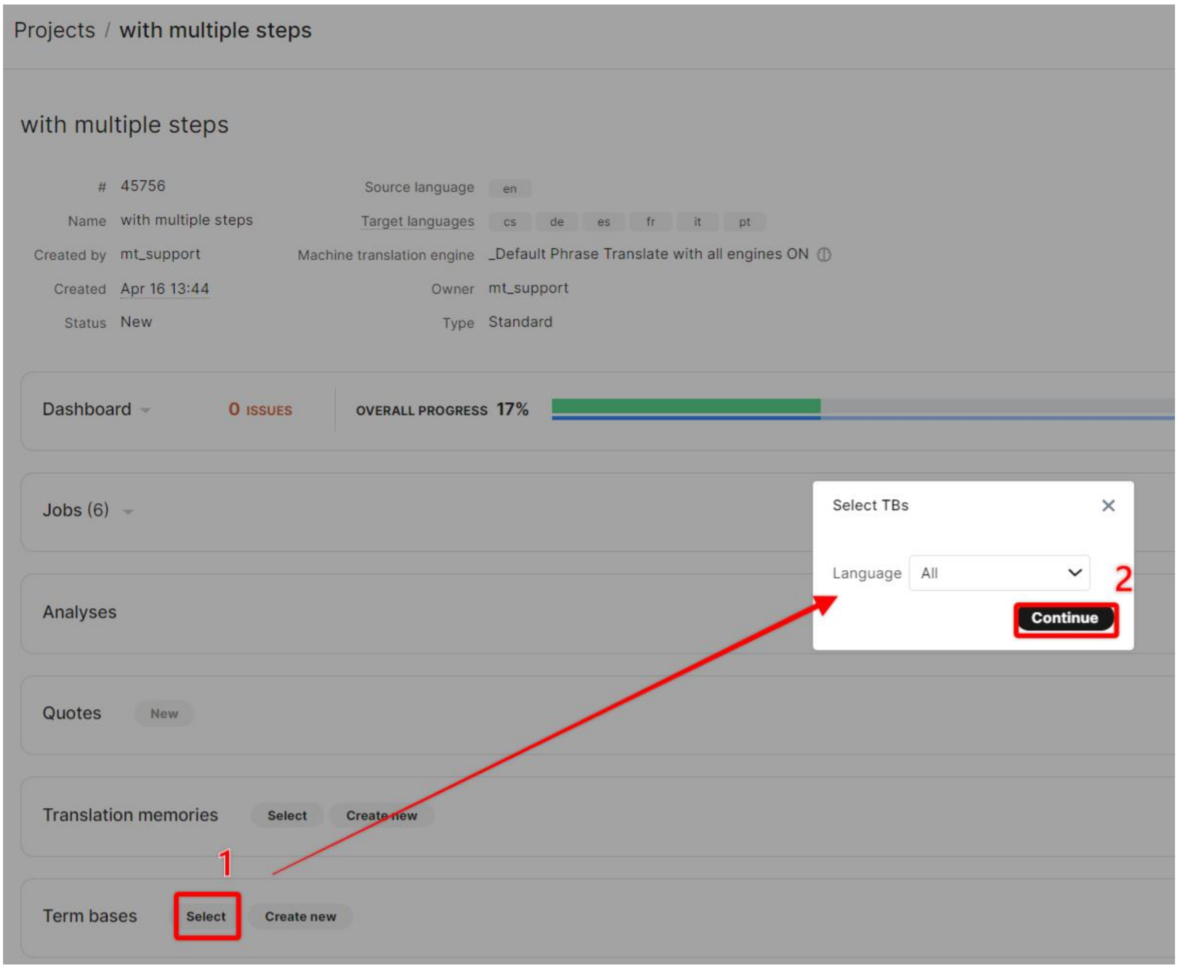
   - **Penalty (%)**
     Set the penalty percentage to apply to your TM matches. For example, with a 5% penalty, 99% matches will be displayed as 94% matches.
   - **Define priority order**
     Enable it to reorder TMs in the list and decide which one will appear as a top suggestion in the CAT editor. In this way, you will also define the TM used for pre-translation.
5. Click **Save all** to assign the selected TMs to the project.



Term bases

You can configure up to 10 TBs for each language pair of your project. In the Projects page, click on the name of your project to open it, then follow these steps to assign TBs:

1. From the project page, scroll down to the Term bases table and click **Select**.
   If the project has multiple target languages, the Select TBs window opens (if there is only one target language, this step is skipped). Select **All** or the desired target language from the dropdown list.
2. Click **Continue** to open the Term bases page, which will show TBs that fit the language settings of your project in the Relevant section.



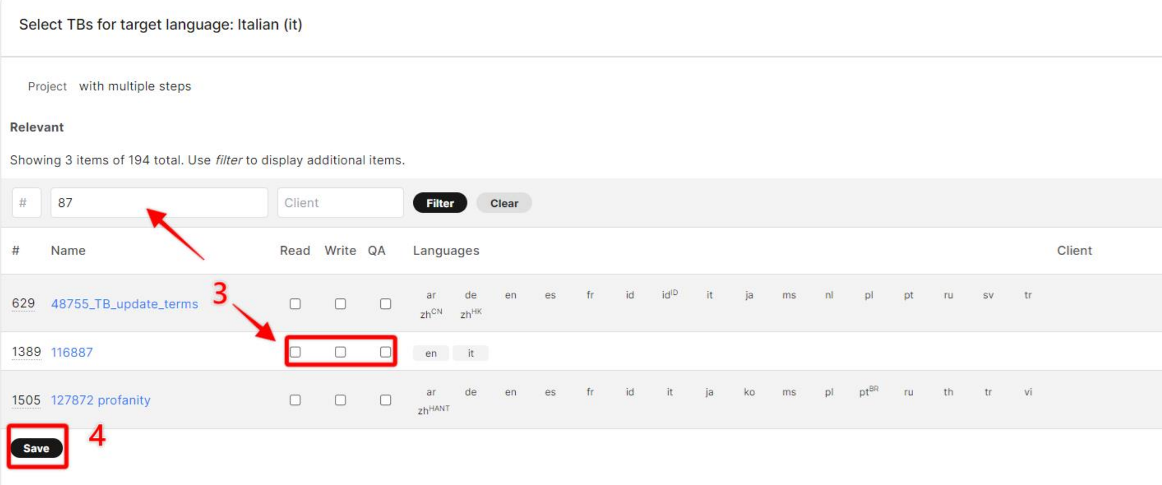
3. If necessary, filter the list of available TBs. Then, set options for the desired TB(s):

- **Read**: Checks if terms are found in the source text, if so they are returned on the CAT pane.
- **Write**: Terms can be added and edited (with limits) by linguists during translation.

> **NOTE**
> Only one TB can be assigned in the write mode.

- **QA**: As part of quality assurance, it is checked if terms with *Approved* status in the source have a corresponding term translation (*New* or *Approved* status) in the target.

4. Click **Save** to assign the selected TBs to the project.



Repeat the above steps if you need to edit the term base configuration of your project.

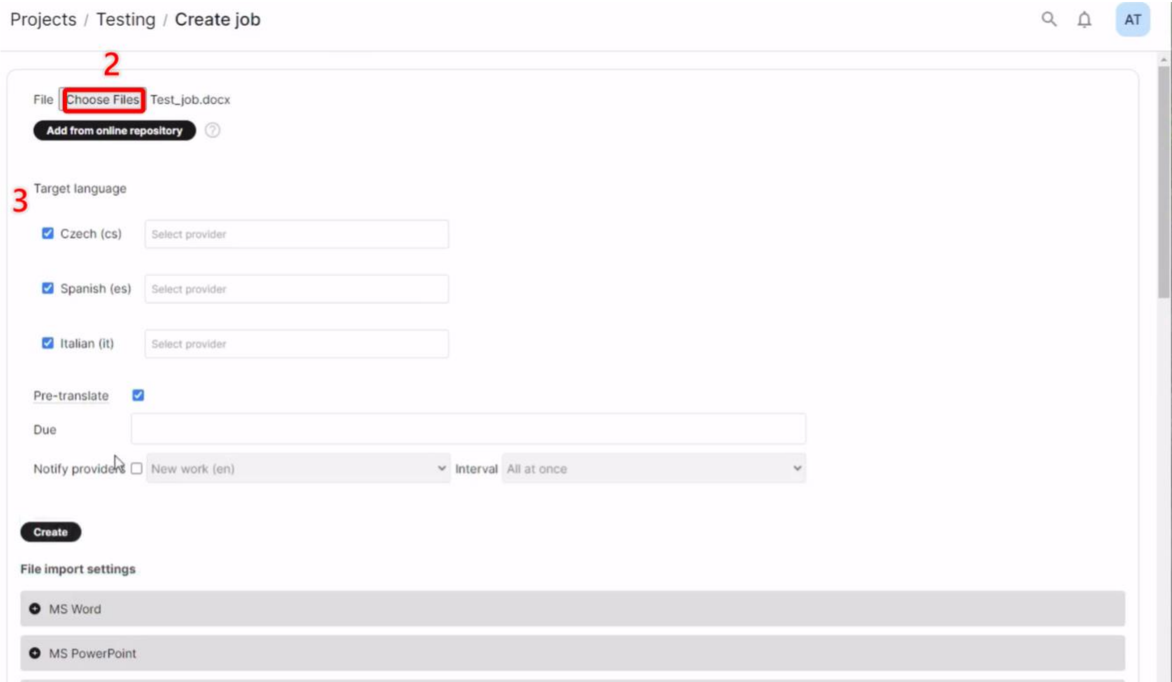
Create a New Job

A job represents a file that will be translated into one of the target languages of your project. If you need to translate a single file from a source into two target languages, that file will be represented by two jobs in the project:

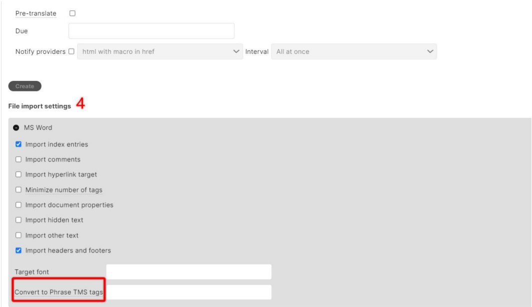
- **Job 1**
  Translation of the file into English.
- **Job 2**
  Translation of the file into Italian.

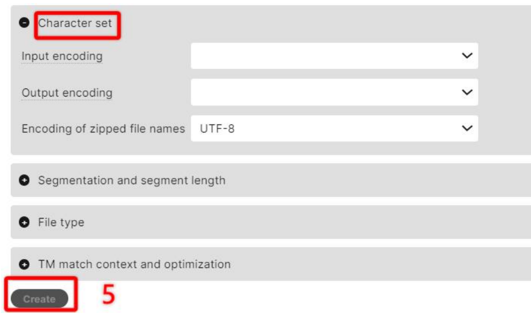
In the Projects page, click on the name of your project to open it, then follow these steps to create new job:

1. From the project page, scroll down to the Jobs table and click **New**.
2. Click **Choose Files** to upload your file.
3. Select the desired target languages from your project.



4. Scroll down to File import settings to double-check and edit predefined settings based on your file format.
   - Convert to Phrase tags allows you to apply regular expressions to convert specified text to tags.
   - You can use the Character set option to specify the Input encoding. If not specified, Phrase TMS tries to determine the encoding from the file header. If this is not possible, default encoding is used.
5. Click **Create** to add the job(s) with status New in the project page.





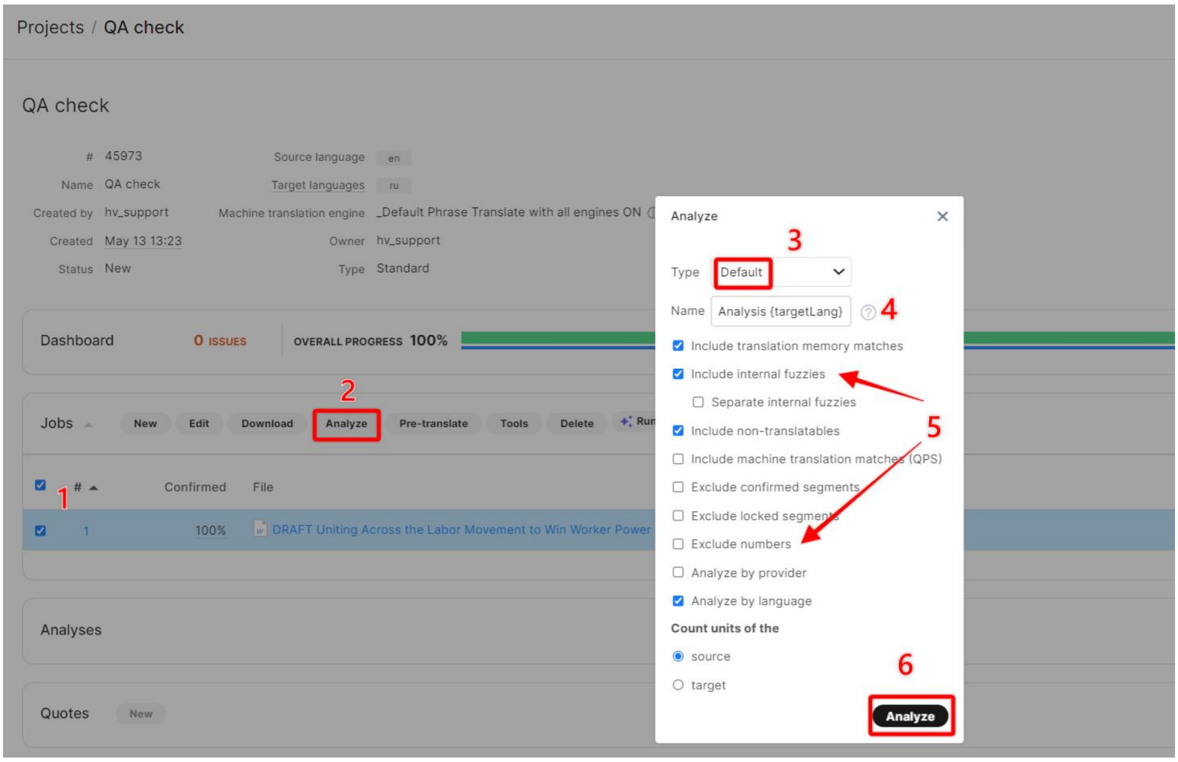
Analyze the source content of your job

Before assigning the job to a provider, you can estimate the translation effort by analyzing the source content. In this way, you will get a breakdown of segment/word/character counts and identify TM/MT matches, non-translatables or internal fuzzy matches.

To generate an analysis of your job(s), follow these steps:

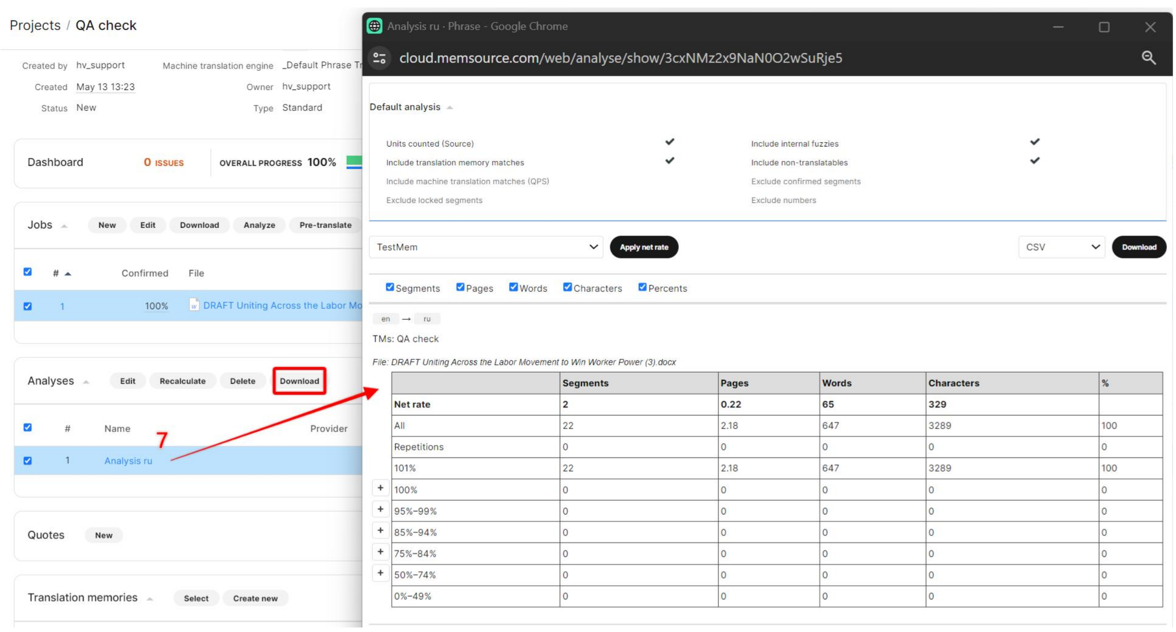
1. From the project page, select your job(s).
2. Click **Analyze**.
3. Select Default from the Type dropdown list.
4. Optionally, provide a name using available macros for easier identification.
5. Select the desired options for your analysis. In particular:
   - Exclude numbers: Exclude numbers from the word count to ensure they are not calculated as words.
   - Include internal fuzzies: Enable this to compare segments within the file for similarities.

   - Separate internal fuzzies: Check this option to display internal fuzzy matches as a separate category.
6. Click **Analyze** to add your analysis to the Analyses table of your project.



7. Click on the analysis to view it in a simple table or download it in one of the supported file formats.

> **NOTE**
> Please note that only JSON format will include detailed breakdowns of NT, MT, TM, and internal fuzzies data per match type.



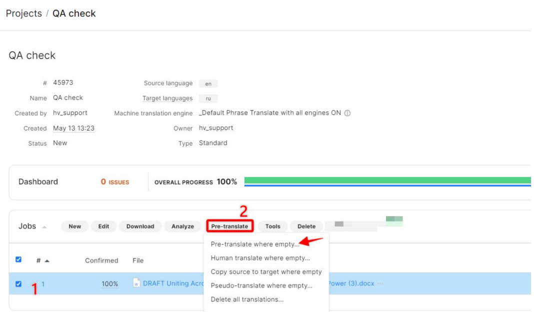
	Segments	Pages	Words	Characters	%
Net rate	2	0.22	65	329	
All	22	2.18	647	3289	100
Repetitions	0	0	0	0	0
101%	22	2.18	647	3289	100
100%	0	0	0	0	0
95%-99%	0	0	0	0	0
85%-94%	0	0	0	0	0
75%-84%	0	0	0	0	0
50%-74%	0	0	0	0	0
0%-49%	0	0	0	0	0

Pre-translate your job

You can use pre-translation to leverage the project resources you already set up (e.g. MT engines and TMs) and reduce the need for extensive post-editing before assigning the job to a provider.

To pre-translate your job, follow these steps:

1. From the project page, select your job.
2. Click **Pre-translate** and select Pre-translate where empty.
3. If necessary, review the pre-translation settings of your project and adjust them according to your needs. Then, click **Pre-translate**.



TIP

You can also decide to apply pre-translation as soon as you create a new job by enabling the Pre-translate option. In this case, the project default pre-translation settings are applied.

Useful articles on Phrase Help Center

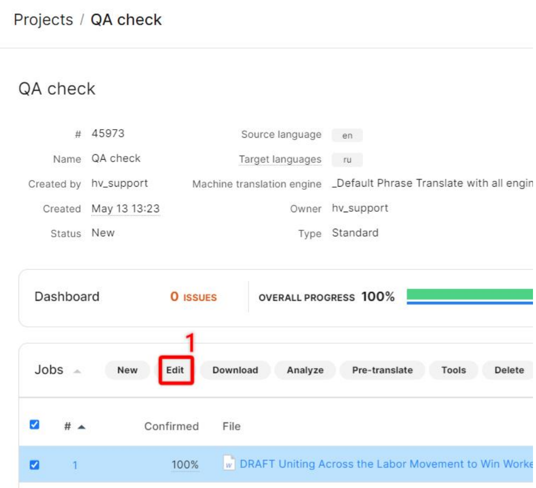
You can find additional information in the following articles:

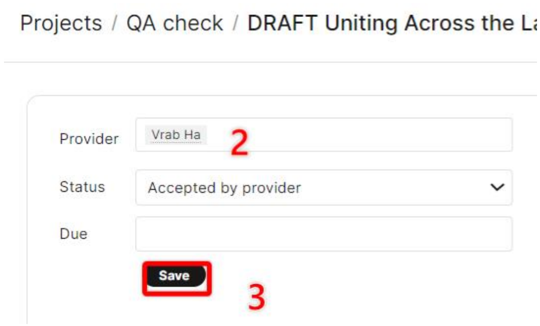
- Project Templates (TMS)
- Workflow (TMS)
- Pre-translation (TMS)
- Quality Assurance - QA (TMS)
- Access and Security (TMS)
- Analysis (TMS)
- Jobs
- Project settings
- Phrase QPS Overview

Assign Jobs and Monitor Open Tasks

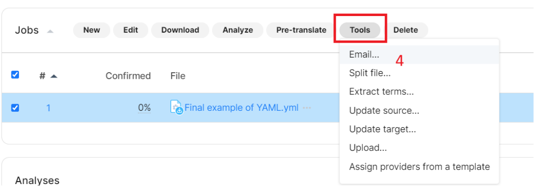
Select and notify the providers for your job

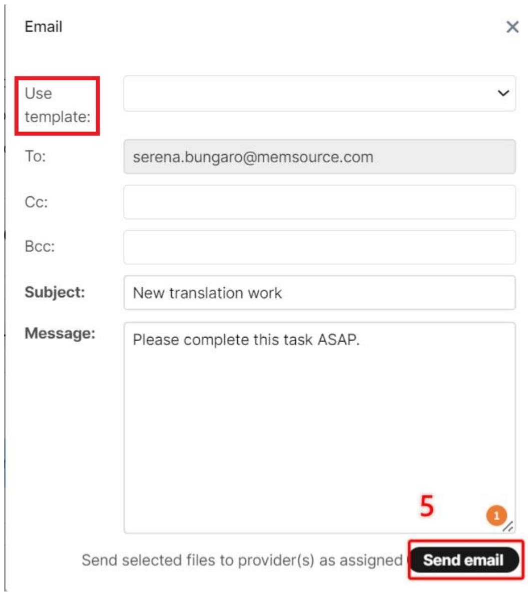
1. Select a job from a Project page and click **Edit**.
   The job editing page opens.
2. Select one or more Provider(s). Hovering over the selected provider will display type (Linguist or Vendor).
3. Click **Save**.
   The Project page opens and the provider(s) are associated with the job. They receive a *New work* email and the job status is set to Emailed.





4. Select the job and click **Tools/Email** to notify your provider(s) about the new assignment.
5. Enter the Subject and Message of the email notification and click **Send email**. Optionally, select one of the default email templates from the Use template dropdown.
   The provider(s) receive a *New work* email and the job status is set to Emailed.

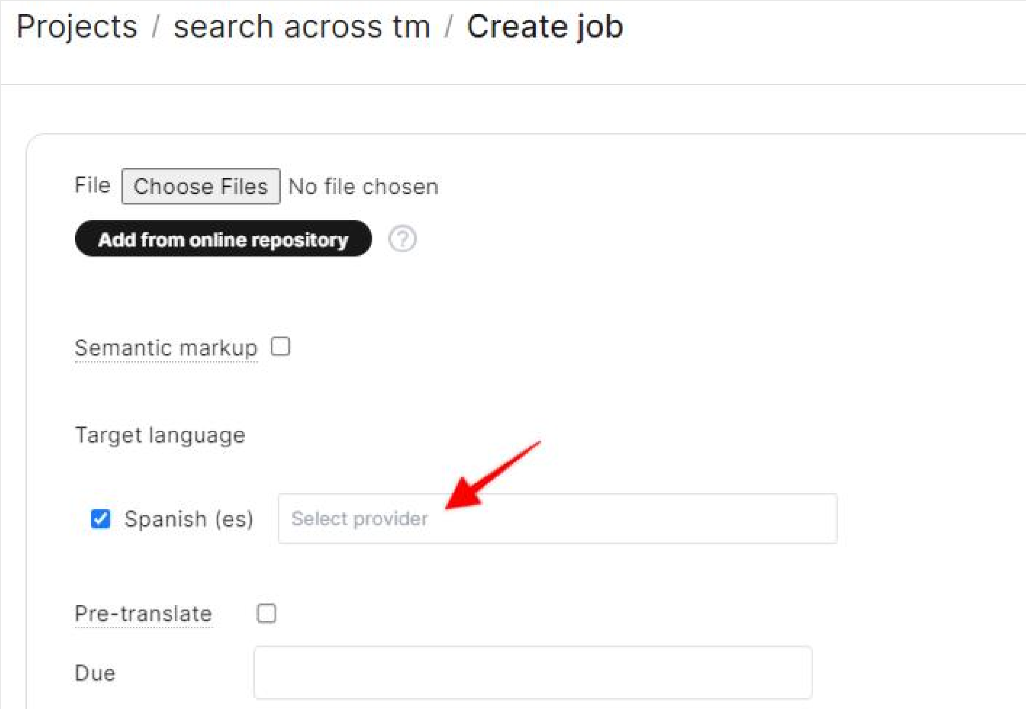




TIP

You can also decide to assign provider(s) as soon as you create a new job by clicking the Select provider field.

Use the Notify providers option to send them an automatic email notification after the job is created.



Once a provider accepts the job, you will receive a *Job Accepted* email. The job status will then be set to Accepted.

Finally, you will receive another notification when the provider sets the job as Completed.

NOTE

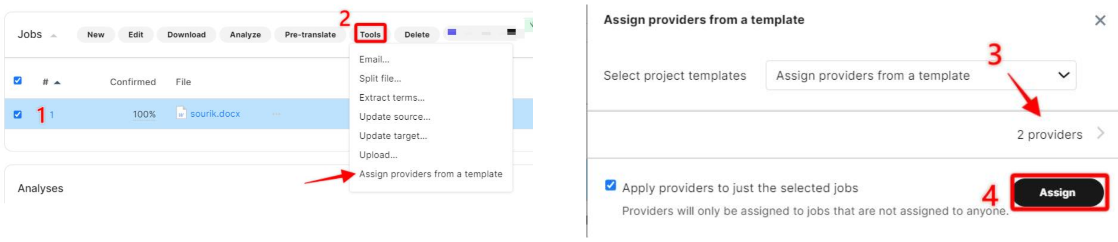
In order to receive any notifications, ensure they are enabled in the project settings.

Alternatively, you can assign providers to each of the project workflow steps using an existing *project template*. Providers can be assigned from multiple templates as long as the templates match the following criteria:

- The number of workflow steps and the source language in the chosen project template must match those in the project.
- Target languages can be different, but at least one of the target languages must be the same.

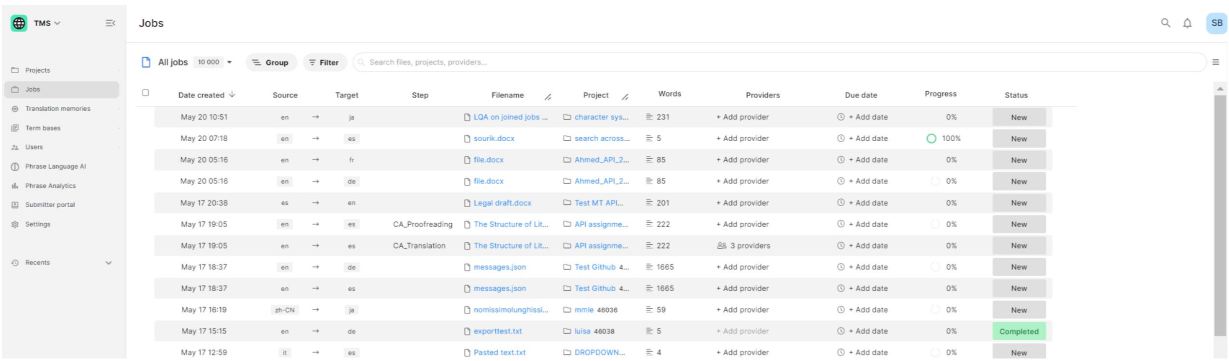
To assign a provider from a template, follow these steps:

1. From the job table, select specific jobs to assign providers.
2. Click **Tools** and select **Assign providers from a Template**.
3. Select a project template from the dropdown menu and optionally to Apply providers to just the selected jobs.
   A list of defined workflow steps and potential providers is displayed. Clicking on the workflow step presents provider details.
4. Click **Assign**.



Monitor and manage your jobs

Select **Jobs** in the left-hand navigation menu to access the Jobs page. In the Jobs page, you can track and manage your jobs across different projects in a single view. The default view lists all your jobs in a table with information such as word count, language pair, and progress under different columns.



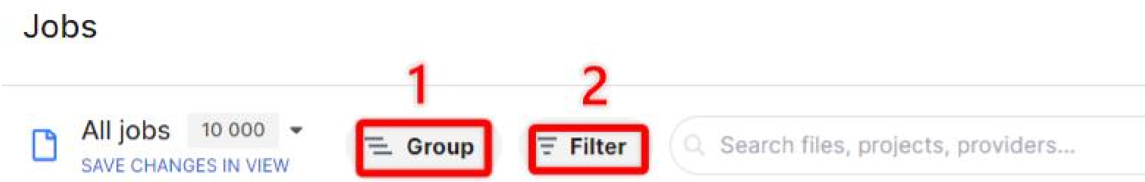
- *Customize the view to track a subset of jobs*

  You can customize which columns are displayed through the column settings ≡ icon. Drag and drop the columns to change their order in the view.
  You can also create and save multiple custom views by grouping and filtering available jobs:

  1. Click **Group** and select one of the available metadata from the dropdown list.
     The job view will group jobs according to the criteria you specified.

     > **NOTE**
     > You can select up to 2 metadata to distribute jobs in groups and sub-groups.

  2. Click **Filter** and select one or multiple metadata to display only specific jobs in your custom view.

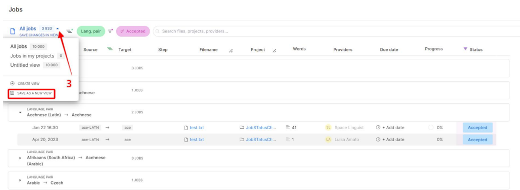


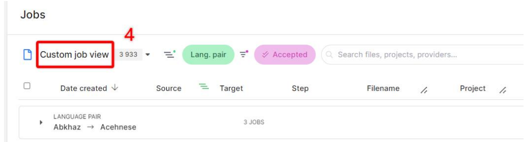
  3. Once you're done, click on the arrow next to the view name and select **Save as new view**.

TIP

Use the arrow next to the view name to switch among all existing views.

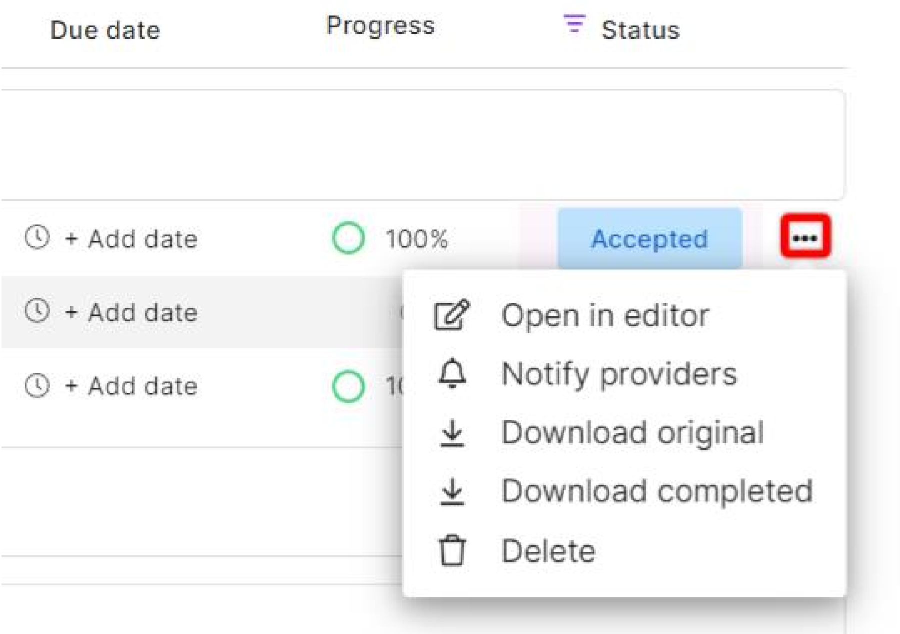
4. Provide a name and click outside the input field to save your customized view.



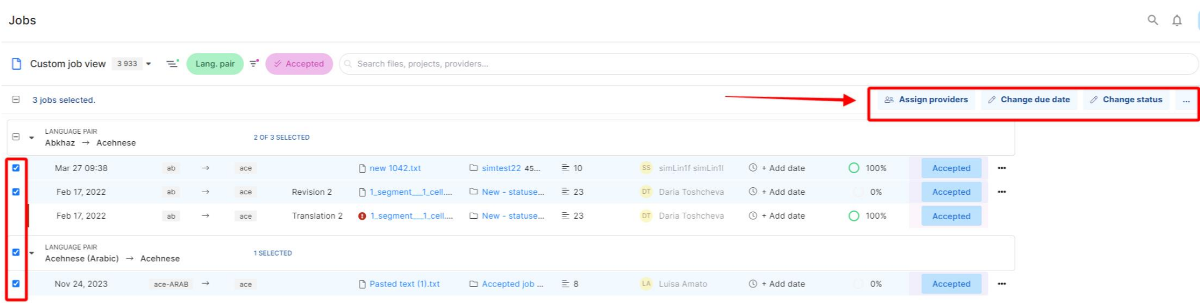


- *Perform actions on jobs*

Hover the mouse over a job in the list to display the job actions icon ⋯ . Click on the menu and select one of the available options to perform the desired action on the job.



To perform bulk actions on a set of jobs, select multiple jobs in the list and choose one of the available options at the top of the view.



Useful articles on Phrase Help Center

You can find additional information in the following articles:

- Jobs (TMS)
- Email Templates and Submitter Portal Macros (TMS)