

# 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

	Projects 2	4 5					Go to classic project lis	t + New project	Q D SB
D Projects	All projects	s 3 + 19. Search projects conte	ont Bets Tilter 3						3 Projocts =
🗇 Jobs 1\$ Settings	□ #Ψ <i>"</i>	Name A	/ Progress / Created / Client	/ Owner	/ Status	// Due date // Target language	4		2
Recents ^	0 7	M30_Globular cluster	Jan 27 13:36	UM_TestPM	New	Feb 28 00:00 de fr	1		
M30_Globular cluster  TB_Quasars	6	M57_Ring Nebula	Jan 27 13:18	UM_TestPM	Assigned	Feb 28 00:00 de hu			
TM_Quasars									

- 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:

	TMS ∨ Ξ<
	Projects +
ĉ	Jobs 1
٢	Translation memories 2
E	Term bases 3
0.0	Users 4
0	Phrase Language AI
ili	Phrase Analytics 6
<u>تۇ</u>	Settings 7

- 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.

#### 🌐 тмз 🗸 ≡< Users TMS 🗸 ≡< Users / Create First name · required 1 Projects Projec New 🗂 Jobs 🗂 Jobs Translation memories Translation me Active Last name Fire Term bases E Term bases .≗≞ Users + □ ✓ 1308 pbe pbe 21 Users Phrase Language Al Phrase Language Al II. Phrase Analytics Submitter portal 1 Settings 2 Recents Linguist Time zone · required Europe/London Edit all terms in TB Edit translations in TM Reject jobs Enable MT Active Opt in to all Phrase newsletters Net rate scheme · optional Price list · optional Note · optiona Relevancy -3

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- 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.

Us	er	S										Q (	AH
			1										
	M	lew	Import	Edit Emai	l login Delete								
	-	Active	#	Last name	First name	Username	Email 🔺	Role	Source langs	Target langs	Editor version	Login history	T
		~	2	Hrba	Aleš	Aleš2	ales.hrba@phras e.com	Administrator			Never used	0	
	2	~	3	Hrba	Aleš	HrbaA_linquist6	ales.hrba@sezna	Linquist	at	en	Never used	0	
		~	11	Alvarez	Canel	ad a sample XLSX fi	2 le.	Â			Never used	0	
	2	~	10	Liorente	Ferna File	hoose File No file o	chosen	5 ianager	65	en	Never used	0	
e	2	~	9	Torres	Fernanuu	remanuo.torres	seznam.cz	Linguiat			Never used	0	

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

Q 🗘 АН

11	S	P	r	S
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	New	Import	Edit Email	login Delete								
0	Active	#	Last name	First name	Username	Email 🔺	Role	Source langs	Target langs	Editor version	Login history	Ť
	~	2	Hrba	Aleš	Aleš2	ales.hrba@phras e.com	Administrator			Never used	0	
	~	3	Hrba	Aleš	HrbaA_linguist6	ales.hrba@sezna m.cz	Linguist	ot	en	Never used	0	

# **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.

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Name Pinner 10 o	Doutor Briganges Sampel Tanguages	Collogendary @ Direct		
Differtiel were ferree of 6772	en-08 ca	Eperpie		
0 TATE-CAD Advert N (271	en-05 es	8 people	2	
				_
			Name	
			Source langua	ge Abkhaz 🗸
			Target langua	es Search
				Abkhaz Acehnese Acehnese (Arabic: Acehnese (Latin) Acholi
			Client	Select client
			Business unit	Select business unit
			Domain	Select domain
			Subdomain	Select subdomain
			Note	

# 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**.

<b>Translation</b>	memories	/ <b>TM</b>	prev/next
i anora cioni			p

TM prev/n	iext					
# Name	6762 TM prev/next	Source language	en es <sup>ES</sup>			
Created by	ca_support	Segments	588			
Created	May 3 18:54					
Owner	ca_support					
Last Import						
Search						
Language	English			✓ Search		
	1					
Import / E	xport Imp	ort Export A	lign			

- 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 10 to see the number of processed segments.
- If there is an error, you will see the **9** icon. Hover over the warning for error details.



TMTB-124	19-MasterTM-reduced		
#	6772	Source language	ence
Name	TMTB-1249-MasterTM-reduced	Target languages	ca
Created by	[_]msupport	Segments	1
Created	May 10 17:10		
Owner	Support		
Last Import	0		

#### • 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/Multiple 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.

Franslation memories / TM prev/next	
TM prev/next	
# 6762 Source language en Name TM prev/next Target languages es <sup>ES</sup> Created by ca_support Segments 588	
Created May 3 18:54 Owner ca_support Last Import	Align X Original 2 File Choose File No file chosen
Search	Segmentation System default
	Language     Spanish (Spain)       File     3       Choose File     No file chosen
Language English V Searc	Segmentation System default ~ rules 4 Align
1 Import / Export Import Export Align	

- 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 **1** 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.

Translation memories / TM prev/next		9 A (	Search	
TM previoest		s Share 🖌 Edit 💿 Duioto		
a 1921 - Energian IV			privacy	
Name TM provident target languages (MP)				
Chanad by 06,300001 Segments 580				
Owner 64,560001			Conforde Endern	
Lesi Inport			X m	667
Search			50 Privacy Office	Oficina de Privacidad
			50 Privacy Office	Oficine de Privacidad
princh 1			e 41 Privacy statement	Declaración de privacidad
Language Englin v East				4
5	exted May 3 1827 3 00 <sup>10</sup>			
50 Physicy Office	el moelfiel May 3 19.27	D*		
S0 Privacy Office	Dficina de Privacidad			
e di Privace datement	Declaración de privacidad			

# 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.

two      Tern base     Tern base     trans     arr     trans     tran     tran     trans     trans     trans     trans     trans	Languaget 20 m	Term base	s / Create
Envirose     NIN VALUEDE     NIN VALUEDE     NIN VALUEDE     NIN VALUEDE     NIN VALUEDE	(a) (a) (b) a - 1 <sup>0</sup>		
I movement	en ou	2 Name Languag	es Search Abkhaz Acehnese Acehnese (Arabic; Acehnese (Latin) Acholi
		Client	Select client
		Business	unit Select business unit
		Domain	Select domain
		Subdoma	in Select subdomain
		Note	
		3	Create

# **Edit your TB**

- Add a new term
  - 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).

Term bases	/ checkup					
checkup						
#	1822 Lar	nguages en es				
Name	checkup	Terms 8				
Created by	la_support					
Created	Mar 21 13:13					
Owner	la_support					
Last Import	0					
Terms	New Delete					
		English 🗸	Search Reset			
Language	e Term	Statu	5	Created	Created by	Last modified
en						
es						
	Cancel Add	2				

- 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.

Name C	heckup Ter	ms 8							
reated by la	a_support								
Created N	/lar 21 13:13					Edit term	4		
Owner la	a_support						4		
ist Import	•								
						Term	traición		
						Language	Spanish 🗸		
rms I	New Delete					25 - 3964.			
						Status	Approved V		
		English	Search R	eset		Preferred			
						Forbidden	0		
Language	Term	S	atus		Created	Case sensitive	0		
	<u>з</u>					Match type	Fuzzy O Exact		
en	betrayal 🖸 🛛	A	oproved		Apr 16, 2024 11:27	Usage			
						1993/11/2019			
	Cancel Add					Part of speech	~		
						0			
						Gender	~		
						Number	~		
						Note			
						Hote			
						Short translatio	n		
						Term type	~		
						Edit concept			
						Domain	~		
						Cubelensein	Search		
						Subdomain	Inactive A	ctive	
							COM - PT - Unic		
							Contracts		
							Defragmented		
							EU		
						100			
						URL			
						Definition			
						Concept sets			
						Concept note			

#### • 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.

Tern che	n bases eckup	/ checkup								
	# Name Created by Created Owner ast Import	1822 checkup la_support Mar 21 13:13 la_support	Languages Terms	en es 8						
T	Language en es	New Delete  Term betrayal traición		English V	Search Status Approved	Reset	File Optio	2 Choose File No file choser ons © Create new terms Update existing terms Strict locale matching	× 4.	by ort ort
		traiciónes traicións		د د	Approved Approved		Apr	16, 2024 11:27 16, 2024 11:27	la_supp la_supp	iort bort
	en es	checkup checkup			Approved Approved		Ma	r 21, 2024 13:14 r 21, 2024 13:14	la_supp la_supp	iort port
0	en es	fee s ciao			Approved Approved		Apr	3, 2024 15:53	la_supp la_supp	iort port
In	nport / E	xport Impo	rt Export	)						

• 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.

Created Mar 21 13:13			
Owner la_support			
ast Import 0		Export TBX/XLSX	
erms New Delete		Format XLSX	~
		Domain All domains	~
	English 🗸 Search Reset	Subdomain All subdomains	~
Language Term	Status	Export Concept ID	
en betrayal	Approved	✓ Status 2 ✓ Forbidden	
es traición	Approved	<ul> <li>Preferred</li> <li>Case sensitive</li> </ul>	
traiciones	Approved	Match type     Usage	
traicións	Approved	Part of speech     Gender	
en checkup	Approved	Number Note	
es checkup	Approved	Short translation Term type	
en fee s	Approved	Created by	
es Ciao	Approved	Last modified by	
4		Domain	
1			

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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.

nport T	BX/XLSX	×
ile	Choose File No file chosen	
ptions	<ul> <li>Create new terms</li> <li>Update existing terms</li> </ul>	
	Strict locale matching	
	Impor	t

# **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.



 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.

	3	×	← Add Human Science	
Alexa Translations A.I.	D Lengoo HALOS	1 Lionbridge SMA/RT MT*		
Human Science	© ModernMT	NpatMT	Credentials	
9 Yandex			URL	
			API key	
			API key 🔯	

# **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.

😫 tais v 🛛 🖄	Projects			Ge is classic project list +	See project 9. 0. 198	Projects / Create
C1 Proeza	All projects (N HH) + (in Beau	h propuls content Baca		1	(M162Projects) =	
0 Inneronmenne -	C A G J Name	$_{\mathcal{S}}$ Fragmen $_{\mathcal{S}}$ Created $\ldots_{\mathcal{S}}$ Direct	g Owner g Status	, Doe date , J. Target language , J	*	

Details 3	Project details	
© Settings	Template	
Machine translation engine	Use template	
Megators	Name - required	
Pre-translation		
Project status automation	Source language - required + 2	
Quality assurance	Select source language	
Access and security	Terror Increases - received	
Spelichecker Completed file name and export path	Select target languages	
Financials	Dee date	
Workflow NEW	MM/DD/YYYY, HH MM	
TM march contrast and contraination		

## 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.

Details	Read more about machine translation.	^
Settings	Q Use MT engine for all target languages 1	
Machine translation engine	No MT engine extend for this ergiest. Manage MT engines	Tennine
Analysis	Wo will engines selected for this project. Manage will engines	r engine
Integrations	Select MT engine per target language	
Pre-translation		
Project status automation	Crea	ate proje

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

Details	Machine translation engine Read more about machine translation.	^
Settings		2
Machine translation engine	Use MT engine for all target languages	3
Analysis	Phrase Language AI 🕧	/ Edit Ø Disable
Integrations	Select MT engine per target language	
Pre-translation		
Project status automation		Create project

Select MT engine per target language

This option allows you to use your Phrase Language AI configuration only for specific target languages 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.

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🗅 Details	Pre-translation	^
Settings Machine translation engine Analysis Integrations	<ul> <li>Overwrite existing translations in target segments</li> <li>Pre-translate on job creation</li> <li>Translation memory</li> </ul>	
Pre-translation •	✓ Pre-translate from translation memory Pre-translation threshold	d 70 %
Project status automation Quality assurance Access and security Spellchecker Completed file name and export path Financials Workflow NEW TM match context and optimization Continuous job	<ul> <li>Non-Translatables</li> <li>Pre-translate non-translatables</li> <li>Display non-translatables scores in Phrase CAT editor</li> <li>Machine translation</li> <li>Pre-translate from machine translation</li> <li>Display Phrase Quality Performance Score in Phrase CAT editor</li> <li>Use machine translation for segments with a TM match of 100% or m</li> <li>Repetitions</li> <li>Auto-propagate repetitions</li> </ul>	ore
	<ul> <li>Auto-propagate repetitions</li> <li>Auto-propagate to locked repetitions</li> <li>Set segment status to 'confirmed' for</li> <li>101% translation memory matches</li> <li>100% translation memory matches</li> <li>100% non-translatable matches</li> <li>Machine translation matches</li> <li>Repetitions</li> </ul>	100 QPS feedback

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.

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Details	Pre-translation	^				
<ul> <li>Settings</li> <li>Machine translation engine</li> <li>Analysis</li> </ul>	<ul> <li>Overwrite existing translations in target segments</li> <li>Pre-translate on job creation</li> </ul>					
Integrations	Translation memory					
Pre-translation .	Pre-translate from translation memory Pre-translation threshold 70	%				
Project status automation	Non-Translatables					
Quality assurance	✓ Pre-translate non-translatables					
Access and security	Display non-translatables scores in Phrase CAT editor					
Spellchecker Completed file name and export path	Machine translation					
Financials	Pre-translate from machine translation					
Workflow NEW	Display Phrase Quality Performance Score in Phrase CAT editor					
TM match context and optimization	Vise machine translation for segments with a TM match of 100% or more					
Continuous job	Repetitions					
	✓ Auto-propagate repetitions					
	Auto-propagate to locked repetitions					
	Set segment status to 'confirmed' for					
	□ 101% translation memory matches					
	100% translation memory matches					
	100% non-translatable matches					
	Machine translation matches     QPS threshold     100					
	Repetitions     QPS feed	back				

# **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:

Details	Quality assurance			^
Settings Machine translation engine	E Linguistic 12 items selected	🔽 Instant QA	Ignore	~
Analysis Integrations	Terminology     4 items selected	Instant QA	Ignore	~
Pre-translation Project status automation	Formatting and tags 7 items selected	Instant QA	Ignore	^
Quality assurance •	Empty tag content			
Access and security Spelichecker	Inconsistent tag content			
Completed file name and export path	Nested tags			
Financials Workflow NEW	✓ No text between tags			
TM match context and optimization	Tags & formatting			
Continuous job	Zags - joined segments			
	✓ XLIFF tags			
	Workflow 3 items selected	🛃 Instant QA	Ignore	~
	Third-party checks 0 items selected		Ignore	~
	Custom checks			~
	Other options 2 items selected			^
	Exclude locked segments from QA			
	Ignore in all workflow steps			
	Ignore not approved terms			
	Linguists may not set jobs with QA warning	s to completed		
	Max. target length as set during job creatio	n		

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.

Details				
Settings Machine translation engine	E Linguistic 12 items selected	<table-cell> Instant QA</table-cell>	🛃 Ignore	~
Analysis Integrations	Terminology 4 items selected	🖌 Instant QA	🗹 Ignore	~
Pre-translation Project status automation	Formatting and tags 7 items selected	Instant QA	🛃 Ignore	^
Quality assurance •	Empty tag content			
Access and security Spelichecker	Inconsistent tag content			
Completed file name and export path	Nested tags			
Financials Workflow NEW	No text between tags			
TM match context and optimization	Tags & formatting			
Continuous job	Tags - joined segments			
	✓ XLIFF tags			
	Vorkflow 3 items selected	🛃 Instant QA	Ignore	~
	Third-party checks 0 items selected		Ignore	×
	Custom checks			~
	Other options 2 items selected			^
	Exclude locked segments from QA			
	Ignore in all workflow steps			
	Ignore not approved terms			
	Linguists may not set jobs with QA warning	s to completed		
	Max. target length as set during job creation	n		

# 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:

## Phrase TMS - Quick Start Guide for Project Managers

Details	Access and security	^
Settings		
Machine translation engine	Project access	^
Analysis	Receive webhooks for this project	
Integrations		
Pre-translation	Display usernames in LQA scorecard	
Quality assurance	Use vendors	
Access and security +	Notifications	~
Spellchecker	The model of the second s	
Completed file name and export path	Email notifications	
Financials	Notify job owner when job status is changed	
Workflow NEW		
TM match context and optimization		0
Continuous job	Allow users to:	
	turn on/off auto-propagation of repetitions in CAT editor	
	V turn on/ off instant QA in CAT editor	
	Linguist access	^
	Allow linguists to:	
	download their translation jobs	
	access the CAT web editor	
	view user metadata in CAT editor	
	only begin workflow steps if the preceding step is 'completed'	
	edit locked segments	
	edit tag content	
	dit source	
	Vendor access	~
	External loading	^
	Allow loading of:	
	external content in CAT editor ()	
	✓ iframes in CAT web editor linkedin.com	
	Enter multiple domain names separated by co	mma

## **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.

	Details	Workflow steps O You can only select up to 15 workflow steps.	^
0	Settings	Translation LOA	
	Machine translation engine Analysis	Revision LQA	
	Integrations	Client review Post-editing	
	Pre-translation Project status automation		
	Quality assurance Access and security		
	Spellchecker		
	Financials		
	Workflow • TM match context and optimization Continuous job	Settings	^
		<ul> <li>File handover</li> <li>Enable assigned linguists to upload documents modified outside of Phrase in the final workflow st</li> <li>Workflow automation</li> <li>Mark unassigned jobs as 'completed' when the previous workflow step has been completed.</li> <li>Update all workflow steps</li> <li>Propagate target updates to preceding and following workflow steps. Updates made to already</li> </ul>	itep.

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 <sup>©</sup> page, scroll down to the Project settings section and click on **Workflow steps**.

TMS ∨ Ξ	Settings
<ul> <li>Projects</li> <li>Jobs</li> </ul>	Subscription Plan and billing details Administration
<ul> <li>Translation memories</li> <li>Term bases</li> </ul>	Active languages Buyers
<ul><li>Users</li><li>Phrase Language Al</li></ul>	Email templates Spellchecker Users
II. Phrase Analytics	Vendors
Submitter portai	Project settings Access and security
-⊙ Recents ✓	Analysis Completed file name and export path Custom file types File import settings Pre-translation Project status automation
	1 Segmentation TM match context and optimization Workflow steps XML profiles

- 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.

Details	TM match context and optimization	^
Settings	Context time	
Machine translation engine	context type	
Analysis	Automatic	~
Integrations	TM matching optimization	
Pre-translation	Previous OR next segment context as 101%	
Project status automation		
Quality assurance	Ignore tag metadata	
Access and security	Penalize multiple 101% TM matches by 1%	
Spellchecker	Prioritize TM matches by metadata	
Completed file name and export path	Select metadata	~
Financials	Select metadata and re-order to define priority. Learn more	
Workflow NEW		_
TM match context and optimization		Create proj

## 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.

Projects /	Create	project
------------	--------	---------

🗅 Details	Project details	^
Settings	Template	
Machine translation engine	Use template	~
Analysis	Name · required	
Pre-translation	My new project	
Project status automation	Source language - required	
Quality assurance	Acehnese	~
Access and security Spellchecker	Target languages · required	
Completed file name and export path	Acholi ×	~
Financials	Due date	
Workflow NEW	MM/DD/YYYY, HH:MM	
TM match context and optimization		
Continuous job	Language adaptation	~
	Metadata	~
		Create proj

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.

Projects / QA check		۹. ۵	Settings / Project ter	templates / Create		9.0
Polybocki OA check CA Check Mar & Hors Hammer (HR) March Mar & Marrison Hammer (HR) March Mar & Marrison Hammer (HR) March Mar & Marrison Hammer (HR) Mar	2 Etern Sour	Q, Q	Settings / Project test Create project test Involve setting Involve setting Involve Setting Se	exceptions I Course sergification and courses and cour	a a a a a a a a a a a a a a a a a a a	Q. Q. (
			Turke Sertings	Add cookers field		
			Machine Strephone     integrations	ir engine		

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.

	Details	>	Project details	^
٥	Settings			
	Machine translation engine		Template	
	Analysis		Use template	^)
	Pre-translation		Recent	
	Project status automation		Content Updates	
	Quality assurance		Marketing Translations	
	Access and security		Product Template	
	Spellchecker			
	Completed file name and export path		Marketing Template	
	Financials		Software Template	
	Workflow		All	
	TM match context and optimization			

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**.

	TMS ∨	$\equiv \langle$	Settings
			Supuomains
	Projects		Quality
Ô	Jobs		Language quality assessment (LQA)
٢	Translation memories		Quality assurance (QA)
	Term bases	.*	Automation
0.	Users	. * .	Automated project creation
$\oplus$	Phrase Language Al		Continuous job
ıh	Phrase Analytics		COTI project creation Due date schemes
+	Submitter portal		Project templates
鐐	Settings		Services Submitter portal

# **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:

- 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.

Projects / with multiple steps	
with multiple steps	
# 45756 Source language en	
Name with multiple steps Target languages cs de	es fr it pt
Created by mt_support Machine translation engine _Default Phras	e Translate with all engines ON ①
Created Apr 16 13:44 Owner mt_support	
Status New Type Standard	
Jobs (6) -	Select translation memories for: X
Analyses	<ul> <li>         ⊕ All target languages         <ul> <li>in the All workflow steps</li> <li>Cancel Continue</li> </ul> </li> </ul>
Quotes New	
Translation memories Select Create new	

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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.

Projects / with multiple steps / Translation memories			م ب (st
with multiple steps Translation memories Selecting for All target languages in All workflow steps			Cancel Save at
Relevant 0 80	C Search for TM	Selected 2	4 Define priority order • 💌
5045 111515_not_deprecated	on → aa +404 •	5044 111515_tm_selection	en → aa (*408) 🛛 Write Penalty 0% • ⊙
5044 111515_tm_selection	en → aa +408 ⊙	5097 112886	en $\rightarrow$ aa #138 $\Box$ Write Penalty 0% $\bullet$ $\bigcirc$
5068 111848	en → ar-AE +85 •		
5097 112886	en → aa +138 ⊙		
5155 114215_Mobile-Generated	en-US → ar-SA +33 ●		
5156 114215_Mobile-lota	en-US → ar-SA +33 ●		

#### **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.

Projects /	with multiple step	DS			
with mul	ltiple steps				
#	45756	Source language	en		
Name	with multiple steps	Target languages	cs de es fr	it pt	
Created by	mt_support	Machine translation engine	_Default Phrase Translate wit	h all engines ON 🕕	
Created	Apr 16 13:44	Owner	mt_support		
Status	New	Туре	Standard		
Dashboa Jobs (6)	ard • O issues	OVERALL PROGRESS	s 17%	Select TBs	×
Analyses	5			Language All	✓ 2 Continue
Quotes	New				
Translati	ion memories sele	ict Create new			
Term bas	Ses Select Crea	te new			

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.

Select TBs for target language: Italia	an (it)					
Project with multiple steps						
Relevant						
Showing 3 items of 194 total. Use filter to c	display additional items					
# 87	Client	Filter Clear				
# Name	Read Write QA	Languages				Client
629 48755_TB_update_terms 3	0 0 0	ar de en es zh <sup>CN</sup> zh <sup>HK</sup>	fr id id <sup>ID</sup> it	ja ms nl pl	pt ru sv tr	
1389 116887		en it				
1505 127872 profanity	0 0 0	ar de en es zh <sup>HANT</sup>	fr id it ja	ko ms pl pt <sup>BR</sup>	ru th tr vi	
Save 4						

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.

Projects / Testing / Create job	Q	Ļ	AT
2       File       Choose Files       Test_job.docx       Add from online repository			
3 Target language			
Czech (cs) Select provider			
Spanish (es) Select provider			18
Z Italian (it) Select provider			
Pre-translate 🛛			
Due			
Notify providers 🗆 New work (en) 🔹 Interval All at once			
Create			
File import settings			
MS Word			
MS PowerPoint			

- 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.

Pre-translate	Character set	
Due		
Notify providers 🛛 html with macro in href 💙 Interval 🛛 All at once 🗸	Input encoding	
Greate	Output encoding	
File import settings 4		
MS Worl	Encoding of zinned file names LITE-8	
Incort inter entries		
Import comments		
Import hyperlink target	Segmentation and segment length	
Minimize number of tags		
Import document properties		
Import hidden text	<ul> <li>File type</li> </ul>	
Import other text		
Import headers and footers		
Target font	<ul> <li>TM match context and optimization</li> </ul>	
Convert to Phrase TMS tags	Create D	

## 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.

Projects /	QA check				
QA chec	:k				
#	45973	Source language	en		
Name	QA check	Target languages	ru		
Created by	hv_support	Machine translation engine	_Default Phrase Translate with all engines ON ([	Analyze X	
Created	May 13 13:23	Owner	hv_support	3	
Status	New	Туре	Standard	Type Default 🗸	
				Name Analysis {targetLang} ⑦ 4	
Dashboa	ard	O ISSUES OVERALL PRO	GRESS 100%	✓ Include translation memory matches	
				Include internal fuzzies	
		2	_	Separate internal fuzzies	
Jobs 🔺	New	Edit Download Analyze	Pre-translate Tools Delete 🔸 Run	Include non-translatables	
			-	Include machine translation matches (QPS)	
	Cor	firmed File		Exclude confirmed segments	
				Exclude locked segments	
2 1		100% W DRAFT Uniting A	cross the Labor movement to win worker Power	Exclude numbers	
				Analyze by provider	
				Analyze by language	
Analyses	S			Count units of the	
				• source 6	
				O target	
Quotes	New			Analyze	

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.

Projects / QA check	Analysis ru · Phrase - Google Chro	me			-	o x
Created by hv_support Machine translation engine _Default Phrase Tr	cloud.memsource.com/w	veb/analyse/show/3cxNMz	2x9NaN0O2wSu	Rje5		Q
Created May 13 13:23 Owner hv_support Status New Type Standard D	efault analysis 🔺					
Dashboard 0 issues overall progress 100%	Units counted (Source) Include translation memory matches Include machine translation matches (QPS) Exclude locked segments	~	Include internal f Include non-tran Exclude confirme Exclude numbers	uzzies slatables d segments	~	
Jobs A New Edit Download Analyze Pre-translate						
#      Confirmed File      1     100% DRAFT Uniting Across the Labor Mo	Segments  Pages  Words en → ru IMs: QA check file: DRAFT Uniting Across the Labor Moveme	Characters Percents				
Analyses Edit Recalculate Delete Download		Segments	Pages	Words	Characters	%
	Net rate	2	0.22	65	329	
# Name Provider	All	22	2.18	647	3289	100
	Repetitions	0	0	0	0	0
Analysis to	101%	22	2.18	647	3289	100
	+ 100%	0	0	0	0	0
	+ 95%-99%	0	0	0	0	0
Quotes New	+ 85%-94%	0	0	0	0	0
	+ 75%-84%	0	0	0	0	0
	+ 50%-74%	0	0	0	0	0
Translation memories Select Create new	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**.

A check	
# 45573 Source language at Nume & GA cence: Target language at Deteild by McLapport Machine transition with all engines ON () Center May 131/23 Over McLapport	Translation memory
Status New Type Standard	Pre-translate from translation memory
Dashboard         O ssue         overall records 100%           Jobs - New Edit Download         Acarge         Pre-treating	Pre-translation threshold 70 %
Pre-translate where engine Pre-translate where engine Copy source to taget where engine Copy source to taget where engine	Non-Translatables
1 100% BRAFT Uniting Acr Pseudo-translate where empty tower (3).docx     Delete all translations	Pre-translate non-translatables
	Machine translation
	Pre-translate from machine translation
	Use machine translation for segments with a TI match of 100% or more
	Overwrite
	Overwrite existing translations in target segment
	Set segment status to confirmed for
	101% translation memory matches
	100% translation memory matches
	100% non-translatable matches
	Machine translation matches
	QPS threshold 100
	Pre-translate & set job to completed
	Set job to completed once pre-translated
	Set job to completed once pre-translated and a segments are confirmed
	Set project to completed once all jobs pre- translated
	Lock
	101% translation memory matches
	100% translation memory matches
	100% non-translatable matches
	100% machine translation matches
	Pre-transla



# 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.

Projects / QA check	Projects / QA check / DRAFT Uniting Across the L
QA check	
# 45973 Source language en Name QA check Target languages ru	Provider Vrab Ha 2
Created by mcsupport Machine translation engineDerault Prirase translate with all engine Created May 13.13:23 Owner hv_support	Status Accepted by provider V
Status New Type Standard	Due
Dashboard 0 issues overall progress 100%	save 3
JObs New Edit Download Analyze Pre-translate Tools Delete	
🖉 # 🔺 Confirmed File	
☑ 1 100% DRAFT Uniting Across the Labor Movement to Win Worke	

- 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.

Jobs 🔺	New Edit Download Analyze	Pre-translate Tools Delete	Email	×
☑ # ♠	Confirmed File	Email 4 Split file		
		Extract terms	Use	~
2 1	0% Final example of YAM	Lyml ··· Update source	template:	
		Update target		
		Upload	To:	serena.bungaro@memsource.com
		Assign providers from a template		
Analyses			Cc:	
			Bcc:	
			Subject	New translation work
			Subject.	New translation work
			Message:	Please complete this task ASAP.
				5
				J (1)
			Send	selected files to provider(s) as assigned Send email



# 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.

File Choose File	s No file chosen	
Add from online r	epository	
Semantic markup	0	
Target language		
Spanish (es)	Select provider	
Pre-translate (		
Due		

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.



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.

lobo May Edit Develore Archive De tarelate	Taala Dalata	Assign providers from a template	×
3003     •	Email Split file Extract terms	Select project templates Assign providers from a template	3
	Update source Update target Upload		2 providers
Analyses	<ul> <li>Assign providers from a template</li> </ul>	Apply providers to just the selected jobs Providers will only be assigned to jobs that are not assigned to an	4 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.

tms v 🖂	Jobs												
Projects	🗋 All jo	obs 10 000 -	∃ Group	∓ Filter		Search files, projects, pro	oviders						
adol. 🖞		Date created $\downarrow$	Source	1	arget	Step	Filename //	Project /,	Words	Providers	Due date	Progress	Status
ranslation memories		May 20 10:51	en	$\rightarrow$	ja		LQA on joined jobs	🗅 character sys	≣ 231	+ Add provider	③ + Add date	0%	New
ferm bases		May 20 07:18	en	$\rightarrow$	es		sourik.docx	search across	≡ 5	+ Add provider	③ + Add date	0 100%	New
thread Language Al		May 20 05:16	en	->	fr		file.docx	Ahmed_API_2	≡ 85	+ Add provider	③ + Add date	0%	New
hrase Analytics		May 20 05:16	en	$\rightarrow$	de		file.docx	Ahmed_API_2	≡ 85	+ Add provider	I + Add date	0%	New
mitter portal		May 17 20:38	es	->	en		Legal draft.docx	🗅 Test MT API	≡ 201	+ Add provider	③ + Add date	0%	New
3		May 17 19:05	en	$\rightarrow$	es	CA_Proofreading	The Structure of Lit	D API assignme	≡ 222	+ Add provider	③ + Add date	0%	New
		May 17 19:05	en	$\rightarrow$	es	CA_Translation	The Structure of Lit	C API assignme	≡ 222	음8: 3 providers	③ + Add date	0%	New
~		May 17 18:37	en	$\rightarrow$	de		🗅 messages.json	🗅 Test Github 4	i 1665 ≣	+ Add provider	③ + Add date	0%	New
		May 17 18:37	en	$\rightarrow$	es		C messages.json	🗅 Test Github 4	≡ 1665	+ Add provider	() + Add date	0%	New
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#### Customize the view to track a subset of jobs

You can customize which columns are displayed through the column settings  $\equiv$  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.

Jobs



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

![](_page_39_Picture_4.jpeg)

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.

Job	S													ςġ
٥	Custom job view 3933 • 🖻 Lang. par 🖻 🖉 Accepted Q. Search files, projects, providers													
Ξ	3 jobs selected.								_		<b>→</b> [	28 Assign providers	Change due date	🖉 Change status 🛛
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# **Useful articles on Phrase Help Center**

You can find additional information in the following articles:

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