Better Translation Technology

XTM User Manual

for Administrators,

Project Managers,

Linguists & Customers

Documentation for XTM Version 12.9

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1. Introduction

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

User roles in XTM

There are pre-defined and configurable user roles in XTM. The administrator is the highest level of user with access to all functions.

Pre-defined user roles in XTM

FUNCTION	Admin	Project Manager	Terminologist	TM Expert	Linguist
Create and edit other Administrators	✓				
Create and edit Project Managers	✓				
Configure XTM	✓				
Review & renew subscription (XTM Cloud only)	✓				
Create and edit other Project Managers	✓	✓			
Create and edit Linguists	✓	✓			
Create Customers	✓	✓			
Manage Projects Archive activate projects, approve delete project with or without TM, manage workflows	✓	✓			
Access to all types of Reports	✓	✓			
Download all types of Reports	✓	✓			
Access to XTM Terminology	✓	✓	✓		
Access to XTM TM Manager	✓	✓		✓	
Access to any of the 4 steps in the workflow	✓	✓			✓

Configurable user roles in XTM

1. PM Creator & Viewer (LPM = Limited Project Managers)
2. PM Projects and Customers (LPM = Limited Project Managers)
3. Cost Approver
4. Requester

Default workflow steps in XTM

Step name	User functionality
Translate	Edit target text. Manually add comments.
Correct	Edit target text Manually add comments. If the target text is changed a new comment is automatically created to record the change made.
Review	Manually add comments
LQA	check translation errors.
Management task	Files can be downloaded but not updated. *Example* entering cost details, approving cost and proposals, printing files, sending files to client
Non-CAT tool process	Files can be downloaded and updated in XTM, but the TM and project segments will not be modified. *Example* DTP (Desktop Publishing)
Automatic	1. Approve the TM of segments. 2. Set the minimum XLIFF:doc status of segments. 3. Set the XTM status of segments.

This manual has been organized in chapters relevant to the different user roles or steps. Since any user may have many roles, you may need to view more than one chapter to have a complete overview of your functionality.

PC set up

You will have either received an email from XTM Cloud or your server administrator should provide you with the web address to access XTM. All you need on your PC is a web browser and access to the internet.
XTM is compatible with

- Firefox
- Safari
- Google Chrome

We strongly recommend that you use the latest shipping version of these browsers to ensure the best performance and stability. It has been optimized to run on tablets as well as PCs.

Note: Enable popups and JavaScript in your browser.

Certain browser plug-ins may affect your ability to log into the system or use some of the features.
Plug-ins incompatible with XTM Cloud:

- Browser Highlighter
- Fast Browser Search

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

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

XTM can be accessed on the following platforms and browsers:

- Windows: Edge, Firefox, Chrome
- Mac OS: Safari 6, Firefox, Chrome
- Linux: Firefox, Chrome
- Mobile: Safari for iPad, Firefox for Android

XTM supports their newest versions and two versions back unless otherwise noted.

Computer activation for XTM Cloud

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

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

Note:

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

File size limitations in XTM

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

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

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

XTM automatically deletes old target and preview files from projects. It checks the number of files in the history for each file type and removes old files over a limit. By default, the oldest files are removed if:

- There are more than 10 files.
- If there are more than 3 files and the total size is greater than 100MB

The limit can be changed per client's request: please contact our Support Team (support@xtm.cloud).

2. XTM Product Description

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

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

Standard modules

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

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

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

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

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

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

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

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

Optional modules:

XTM Portal
This module can be integrated into your customer-facing website to allow your customers to start translation projects. They can upload files, specify target languages and other requirements. They can receive a quotation, which they can accept and pay for. Customers can also create an account which allows them to view and manage their own projects. Portal administrators may customize the appearance of XTM Portal and choose which pages are visible to standard users. Additionally, registered users can log into XTM Portal using Single-Sign-On authentication. Contact XTM support team to activate XTM Portal in your system.

XTM Connect
XTM Connect makes integrating XTM with other systems straightforward. It includes out-of-the-box connectors for popular CMSs and an SDK of fully documented web services with a sample code to build custom integrations. The following out-of-the-box connectors are currently available:

- Adobe Experience Manager
- Applanga
- AutoCAD
- Bluestream
- Contentful
- Crownpeak
- DITAToo
- Drupal
- easyDITA
- Easyling
- Episerver
- Figma
- GIT
- Google Sheets
- HubSpot
- InDesign server
- Instinct tools – DITAWorks
- Ixiasoft
- Jira
- Kentico Kontent
- Kentico Xperience
- Marketo
- Marketo Engage

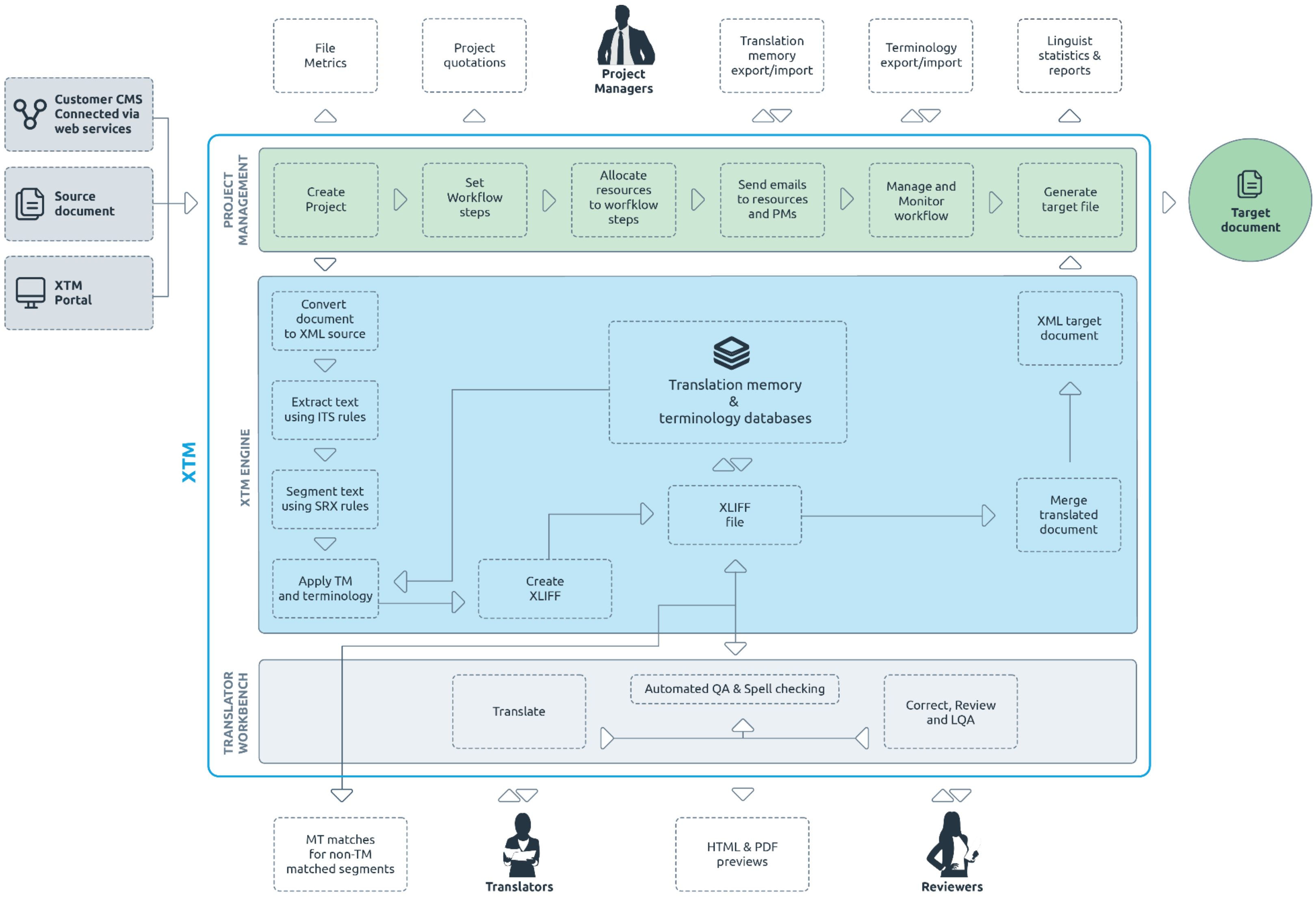
- Microsoft Excel Online
- Microsoft VSTS / TFS
  (Team Foundation Server)
- MindTouch
- Oracle Eloqua
- Oracle Service Cloud
- Plunet
- Rigi
- SalesForce Commerce Cloud
- SalesForce Service Cloud
- SDL Live Content
- Sitecore
- Slack
- TeamSite
- WordPress
- XTRF
- Zendesk

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

Standards Support

XTM International is committed to using and developing open standards. We are active in the many Open Standards Technical Committees. For a full list of the standards supported by XTM please see our website https://xtm.cloud/documentation/.

XTM Translation Project Dataflow



3. XTM for Administrators

XTM Licensing

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

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

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

Logging in

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

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

Logging out

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

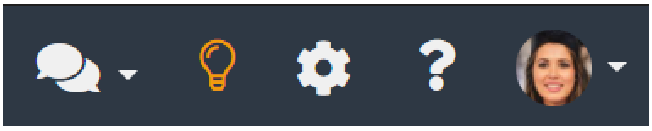
New features in XTM Cloud

How to access the What's new in XTM Cloud pane
Select the light bulb icon from the top menu bar.
Features listed here are relevant to the user role of the logged-in user and are applicable to the latest XTM Cloud version.

Help and information

Select the question mark from the top menu bar to access the Help and information section containing:

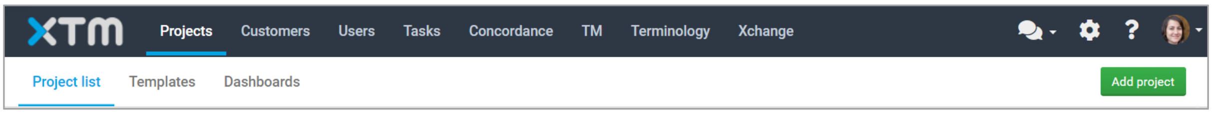
- the current XTM Cloud version and the build date
- Contact information for the XTM Cloud support
- Contact information for the XTM Sales
- link to the XTM Community page
- Subscription Agreement
- XTM Cloud User Manual
- XTM Privacy Policy
- link to Knowledge Base
- link to XTM webinars
- Data processing agreement



Help and information side bar

Administrator options

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



Options for an Administrator user

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

Options for a Freelance user in XTM Cloud

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

Configuration

Options visible on the configuration tab depend on whether you are using XTM Cloud and XTM Suite:

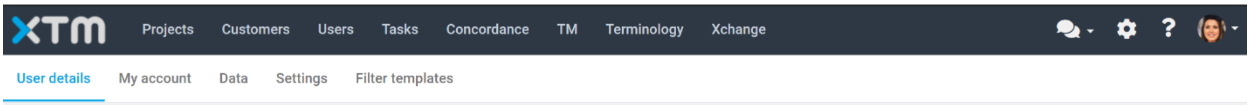
1. User details
2. My account (only visible to XTM Cloud users)
3. Data
4. Settings
5. Filter templates

User details

Select the Configuration gear icon from the main menu bar to access User details.

In the User details tab, you can:

- change user password
- update user personal details
- change the interface language
- select the time zone
- select the date format
- set your availability for work



User details

My Account

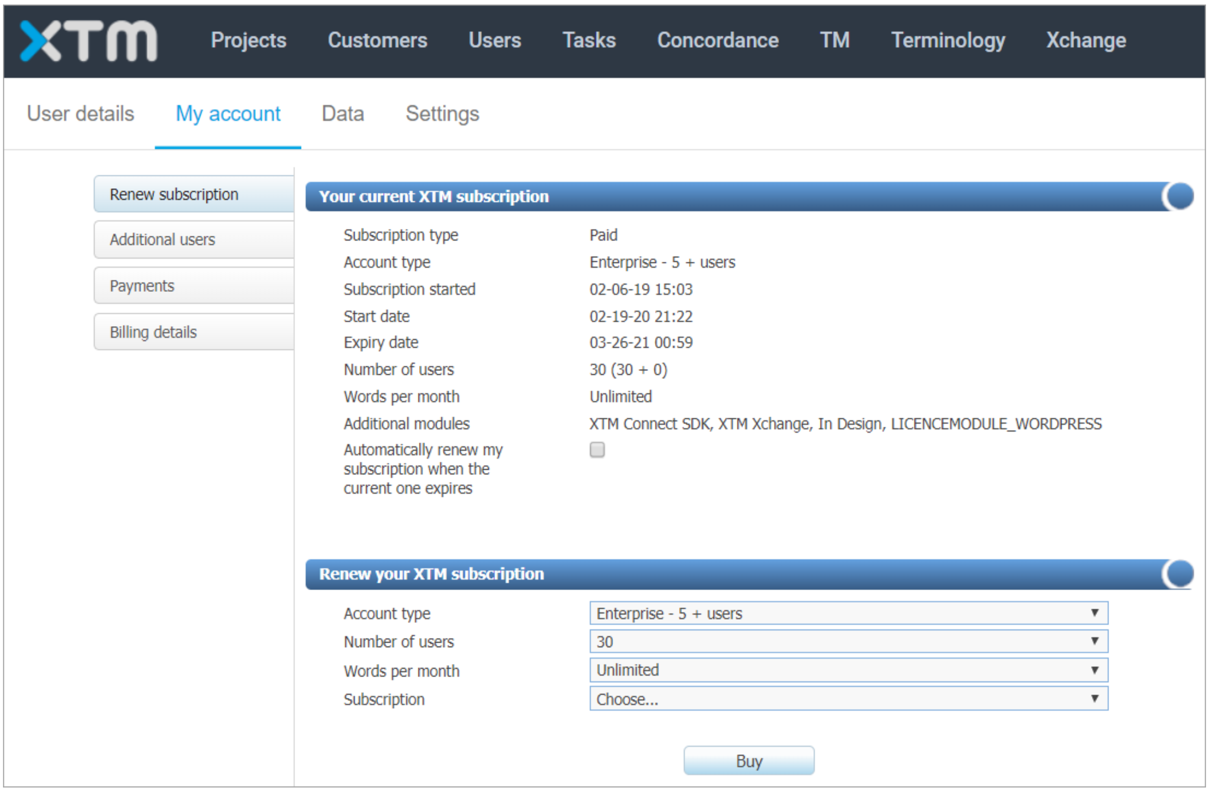
The My account tab has five sections which will appear depending on your type of account:

My Account - Renew subscription

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

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

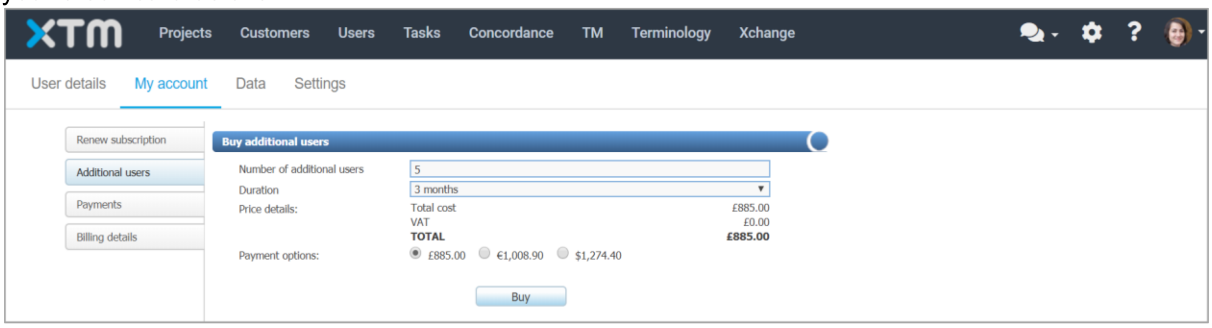
When you change your subscription any unused days of your existing subscription are credited back to you and a new subscription created.



My account tab – Renew subscription

My Account - Additional users

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



My account tab – Additional users

My Account - Payments

The payments tab displays a list of payments you have made to XTM International for your subscription to XTM Cloud.

To download a copy of your invoices from this screen

1. Go to Configuration > My account > Payments.
2. Select the invoice icon in the last column.

My Account - Additional words

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

My Account - Billing details

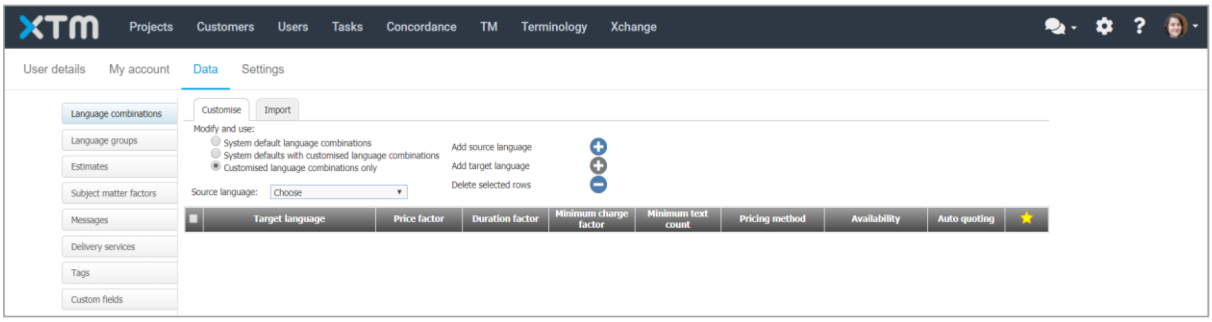
Your billing details will be completed automatically if you have signed up for XTM Cloud via the XTM International website.

How to upgrade a trial account to a full paid account?

1. Go to the configuration > My account > Billing details.
2. Fill in all required details and click Save.

Data

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



Data tab

Data - Setting language combinations

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

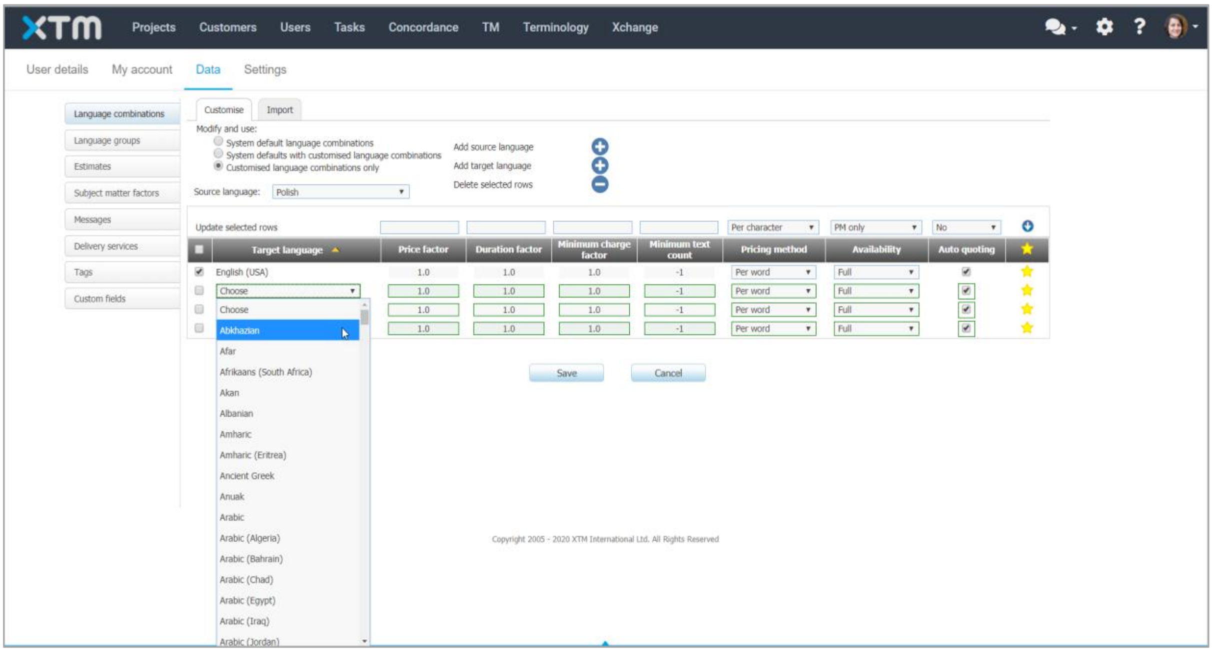
Customise tab

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

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

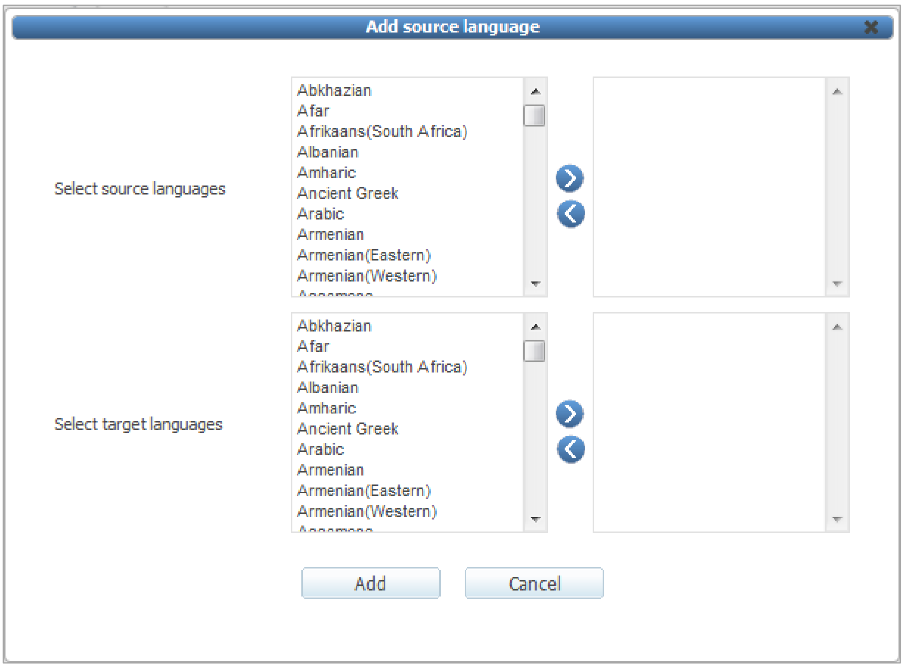
When you have selected one of the customised options it is possible to add and delete source and target languages.

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



Adding a target language

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



Adding source languages with their respective target languages

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

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

You can change:

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

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

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

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

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

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

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

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

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

Import tab

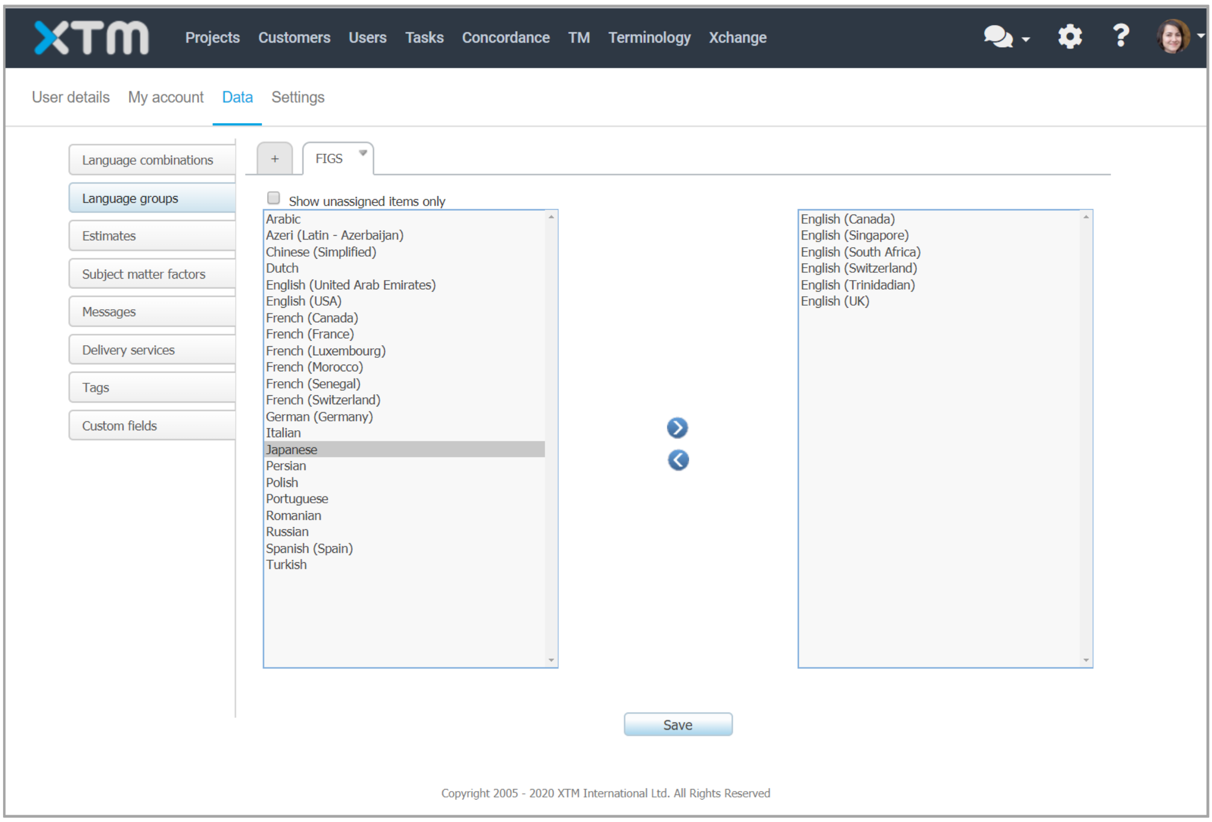
On the import tab you have the facility to upload an XML file with the required language combinations. You may download example files by clicking on the green button. You can use these files as they are, or alternatively use them as templates and modify them according to your requirements.

Additionally, there is an example of a template is shown in Example file for setting language combinations. When the files are ready upload them to XTM by browsing to the file and clicking the import button.

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

Data - Language Groups

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



Creating a language group

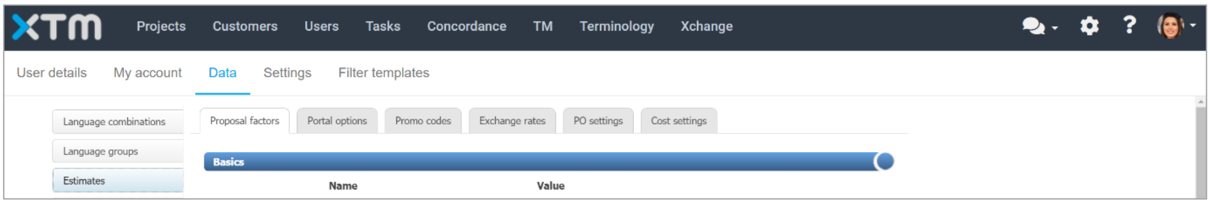
To create a language group

1. In configuration > Data > Language groups, Select the plus icon + and move the desired languages by clicking on the arrow icon to the right-hand box.
2. Click Save.

Data - Estimates

Setting proposal factors

1. Go to Configuration > Data > Estimates > Proposal factors.



Setting the default estimate factors for XTM

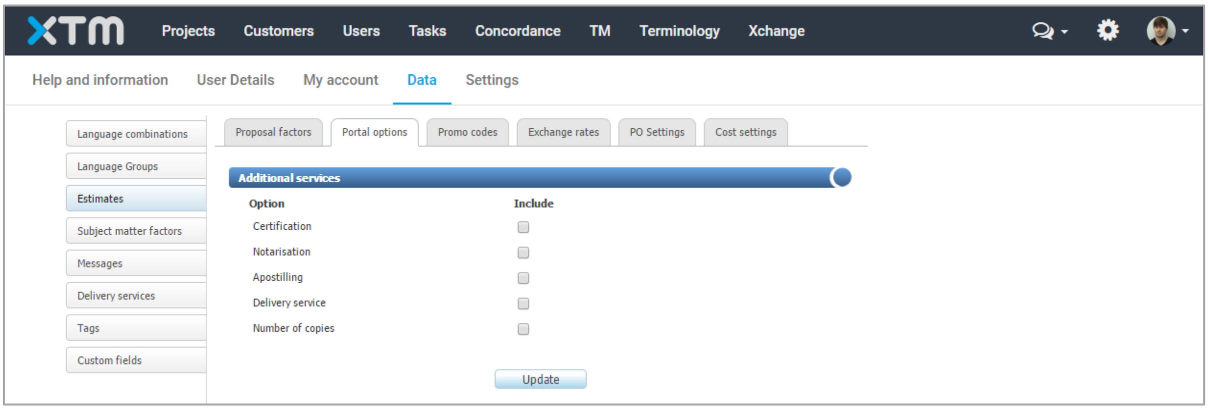
Using this tab, you can set the default factors that are used to automatically calculate the cost and duration estimates for customers. The factors are:

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

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

Portal options

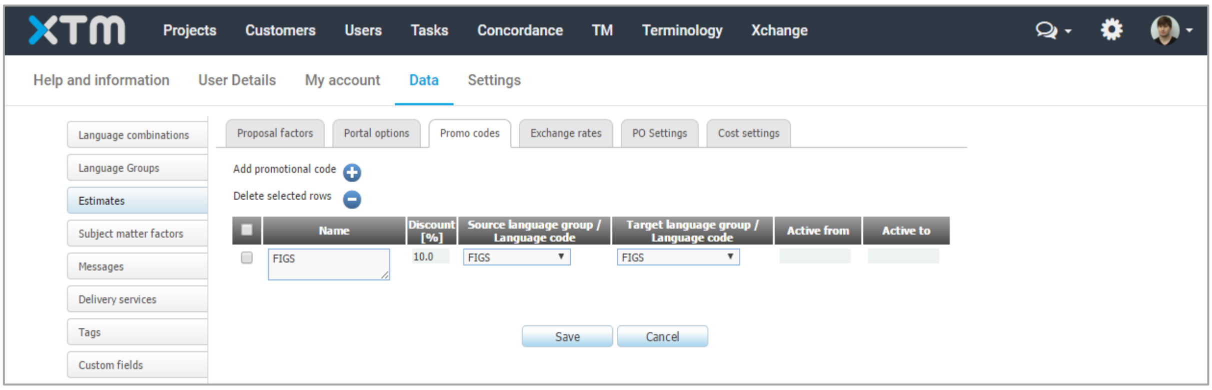
If you have purchased XTM Portal, you can display a number of options for the customer to select. Checking the boxes on this page displays the option in XTM Portal. The costs for these services are set on the proposal factors page.



Setting options for XTM Portal

Promotional codes

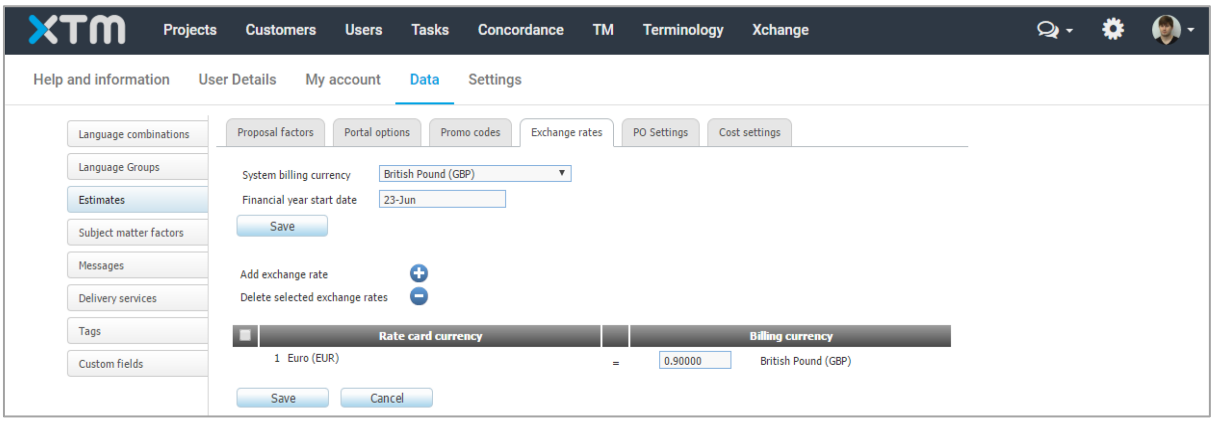
If you have XTM Portal activated on your system, you will see this screen. It allows you to set a promotional code to give your customers a discount on defined language pairs.



Creating a promotion code for XTM Portal

Exchange rates

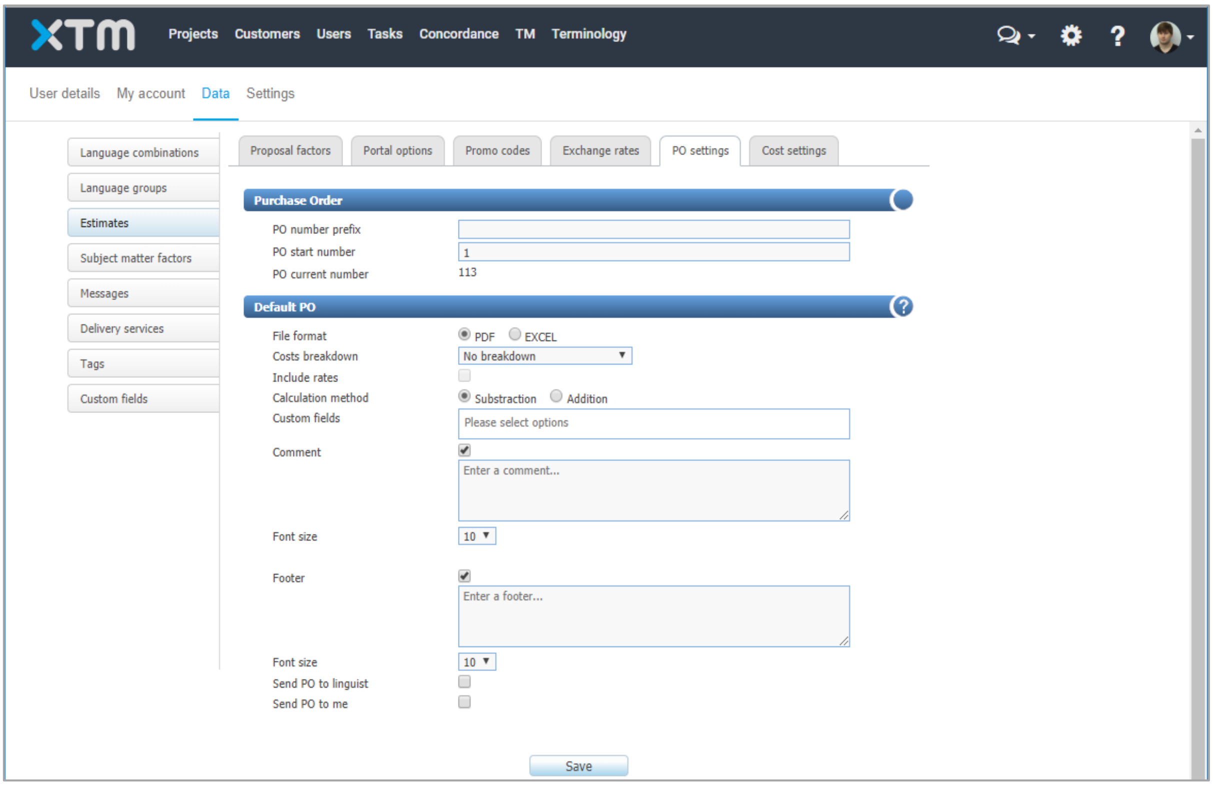
The supplier's rate cards can be in any currency, so it is necessary to set the exchange rates that XTM will use to calculate costs in your billing currency. First, enter your billing currency and then add the desired exchange rates for suppliers you use.



Setting the currency exchange rates for use within XTM

PO Settings

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



Configuration > Data Estimates > PO settings screen

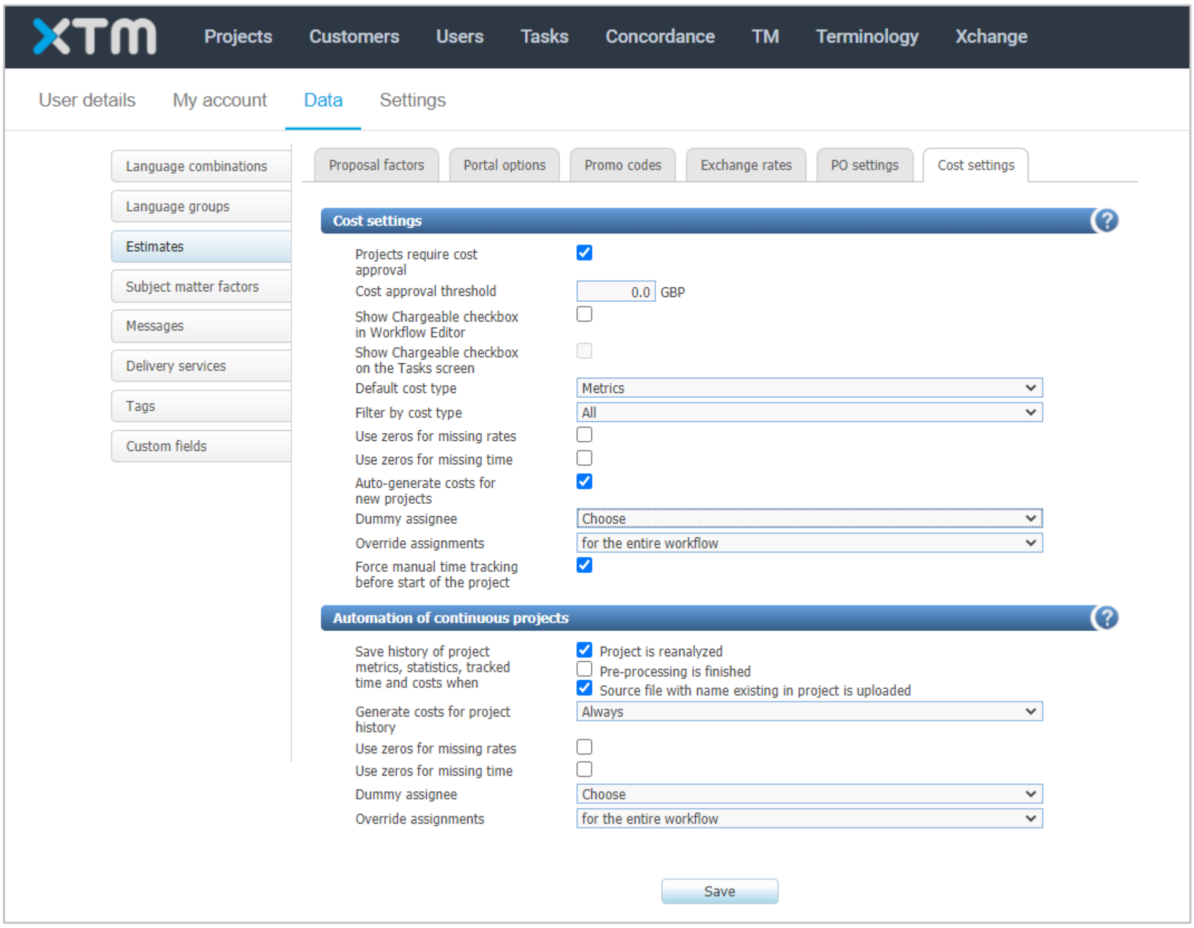
Purchase Order. The PO start number field lets you count purchase orders from the number of your last issued purchase order number when it is different from current PO number. PO number prefixes can be used to adjust translation purchase order numbers to your organization needs.

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

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

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

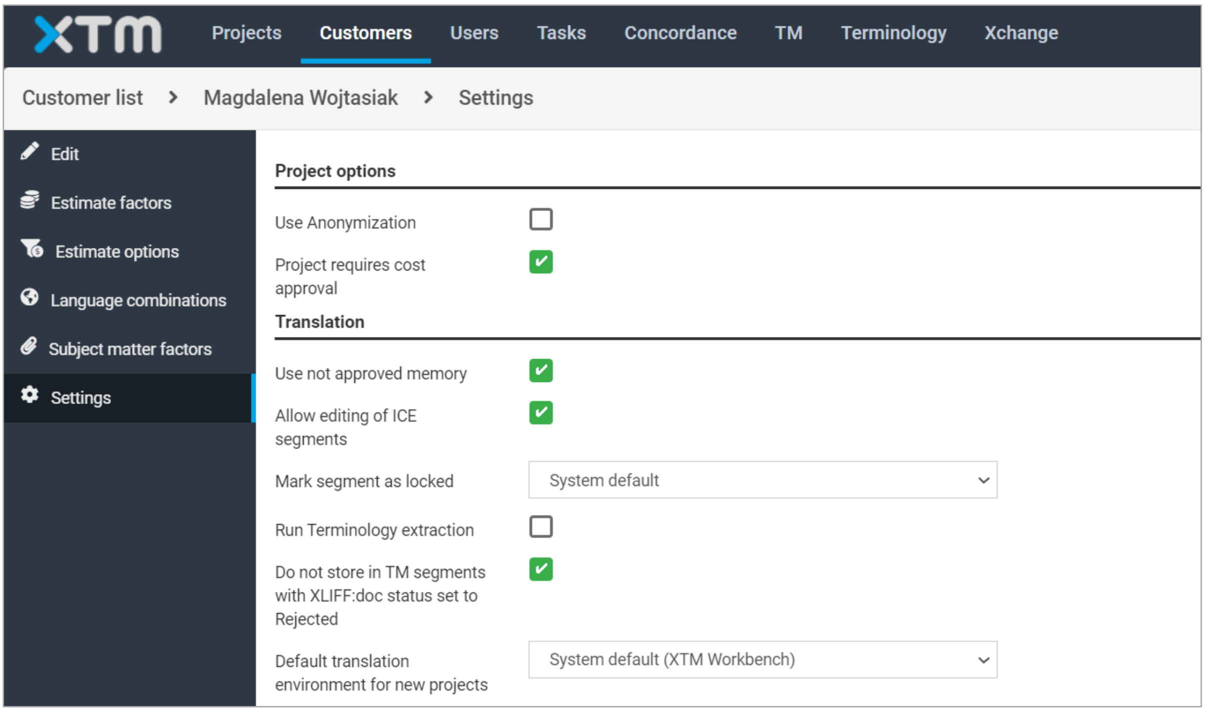
Cost settings



Projects costs – Configuration tab view

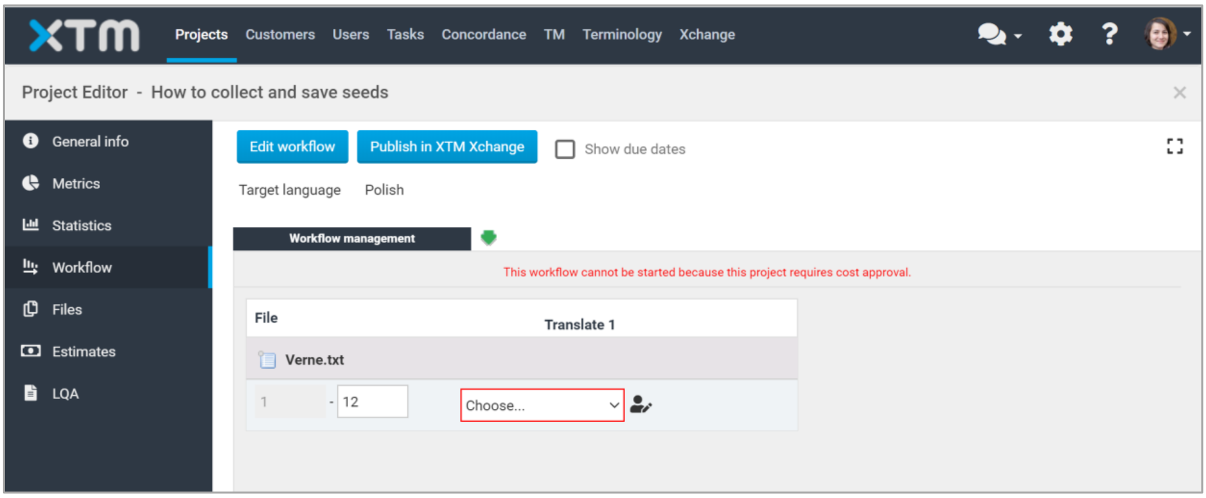
Projects require cost approval – With XTM it is possible to link cost approvals to the start of the project. By enabling this feature, you make sure that translation work does not exceed your budget nor is it outsourced at unfavorable rates. The option is activated under the Configuration cog icon (Data tab > Estimates > Cost settings). Check the Projects which require cost approval box and save the changes. With this option enabled, Requester users can be created.

When the option of approving project costs is activated at the system level, it also appears on the customer level (Customers > Edit > Settings). The option can be checked or unchecked for any customer when adding new Customers or editing the Customers from the list.



Cost approval – Customers tab view

When the field Project requires cost approval is active, the projects created for the customer will only start when their costs are accepted by the Cost Approver. The role of Cost Approver is added automatically when the option Projects require cost approval is activated under the Configuration icon .



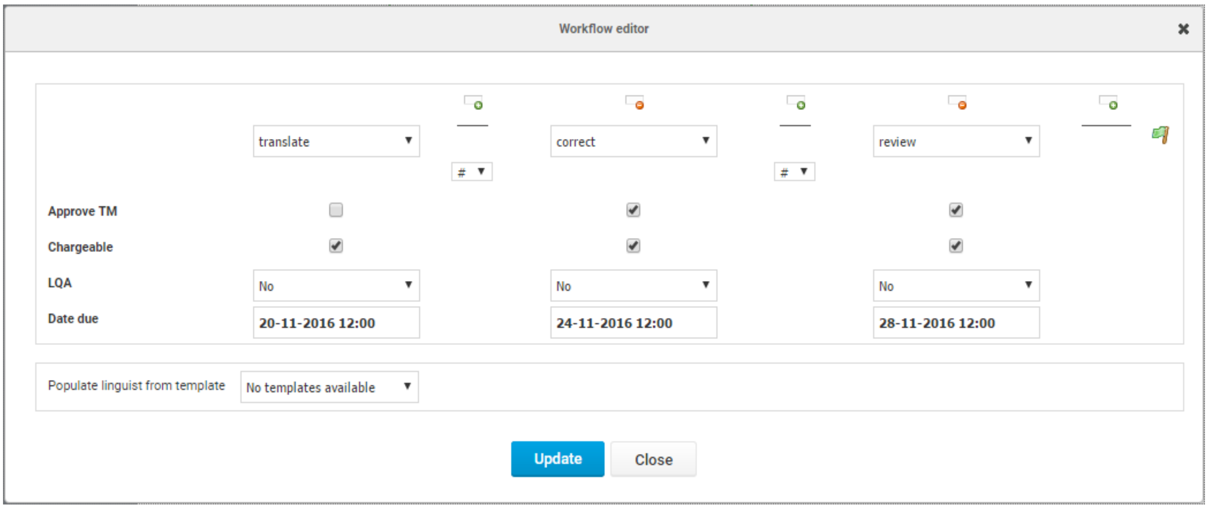
Cost approval for projects – workflow management view

Cost approval threshold – the minimum amount that triggers the cost approval process when generated project costs equal or exceed the threshold. If project costs are higher than the agreed threshold amount, the Cost approval process is activated. If project costs are lower than the threshold amount, the Cost approval process does not apply.

Show Chargeable checkbox in Workflow Editor / Show Chargeable checkbox on the Tasks screen – XTM has an option to allow you to set a step in the workflow is chargeable.

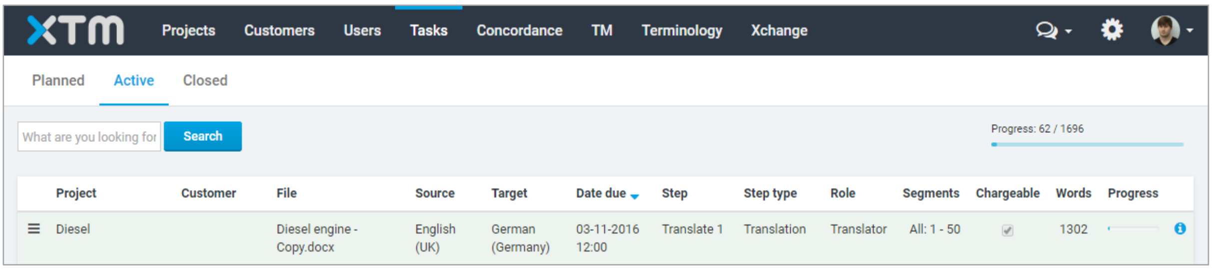
This can be useful if the customer has pre-purchased a certain level of service. If this level of service is exceeded, then the step may become chargeable. The Cost settings tab allows you to switch this feature on and off and decide if it should be accessible for linguists or only project managers. You can also select the default cost type used for calculating estimates, such as metrics, current metrics, statistics source or statistics target.

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



A Chargeable checkbox in the Workflow editor

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



The chargeable checkbox appears as an editable column on the Tasks screen

Default cost type – you can decide what the generated costs will be based on: Current metrics, Statistics source, Statistics target, Time or statistics source, Time or statistics target, Time or metrics initial, Time or metrics current. The settings introduced here may be changed per each project.

Filter by cost type – this option lets you set the way costs are filtered and displayed when generating costs in the Costs table under Projects >Show estimates > Estimates > Costs. You can have them all displayed, or only those based on Metrics, Current metrics, Statistics source, Statistics target, Time or statistics source, Time or statistics target, Time or metrics initial, Time or metrics current. The settings introduced here may be changed per each project.

Use zero for missing rates and Use zero for missing time – with this option enabled XTM can generate costs for linguists who do not have any values set in their rate cards or do not track time. This option is activated here, and in the Project Editor under Projects > Show Estimates > Costs.

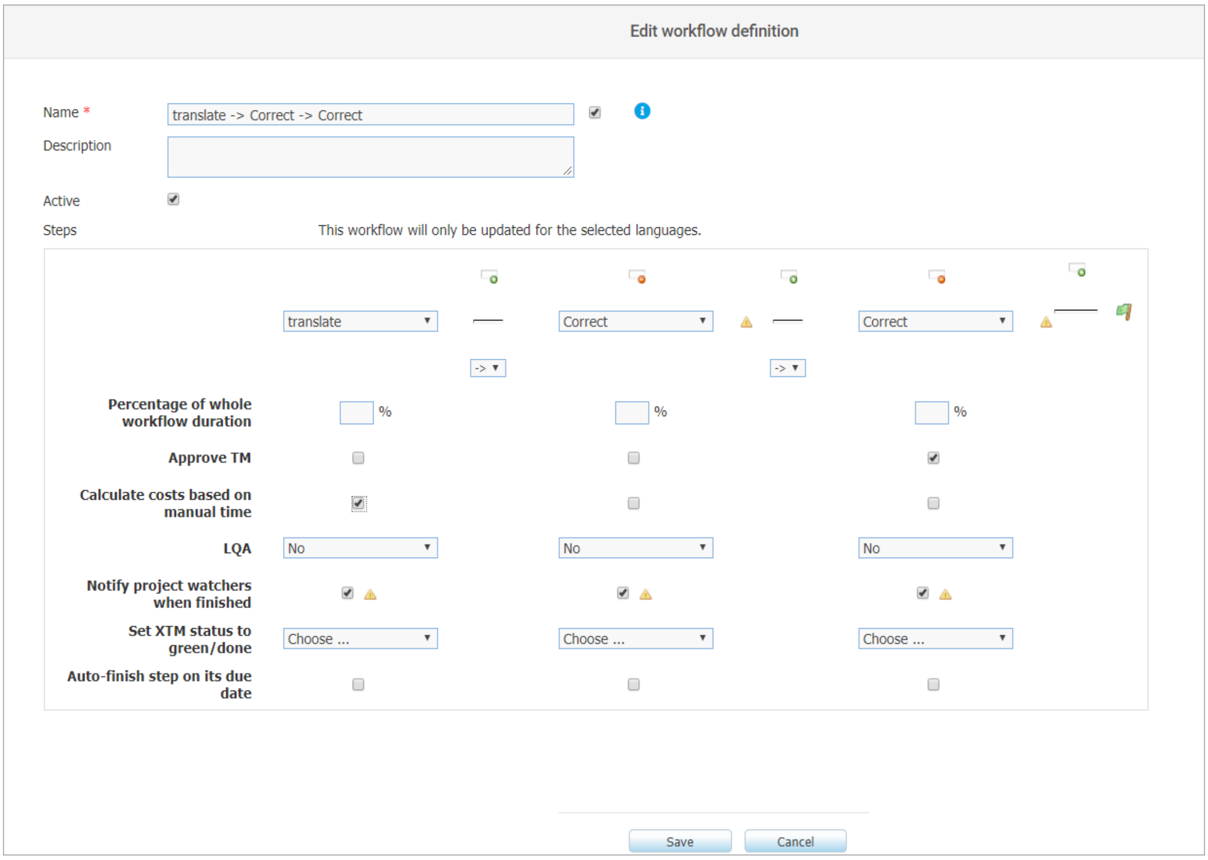
Auto-generate costs for new project – calculates project costs automatically once the project analysis is finished.

Dummy assignee – specifies a dummy assignee whose rate card values can be used to estimate costs

Override assignments – specifies whether to use dummy assignee settings for the entire workflow or only where no linguist has been assigned.

Force manual tracking before start of the project – This option can be configured only at the level of global system settings. The option will allow PM, linguists, or LSPs to enter a time value in the fields assigned to steps with the Calculate costs based on time option enabled. To make the Force manual tracking feature work to your advantage two other actions are required.

First, go to Configuration > Settings > Projects to activate the Time tracking option. More details on this can be found in the Time tracking section below in the document. Next, activate the Calculate costs based on time option. To do this, go to Settings under the Configuration cog, then to Workflow > Workflow definition. Select the context menu by the workflow Definition name that you want to change and go to Edit.



Calculate costs based on manual time – Edit workflow window view

You can enable the option of calculating costs on the basis of time tracked manually for any step of the workflow. Save your changes.

When setting up a project, apply the workflow in which you have activated the Calculate costs based on manual tracking option.

Calculate cost based on edit distance: the edit distance calculation (EDC) helps you track the number of changes made by a post-editor in a machine-translated target segment. EDC is based on a metric that corresponds to the number of characters edited in a target machine translated segment divided by the total number of characters in that segment. This calculation results in an EDC score, which ranges from 0 to 1, the score is rounded down to 1 if the score is greater than 1

A score of 1 corresponds to a segment that requires a complete edit of the machine translation output and would be reflected by the maximum amount of payment.

The EDC score is calculated using CharacTER algorithm.

To activate this option, select the checkbox and then go to Configuration > Data > Estimates > Cost settings > Calculate cost based on edit distance.

There are two types of EDC report that you can generate in XTM Cloud:

1. Extended Table
2. Project cost, metrics and assignments

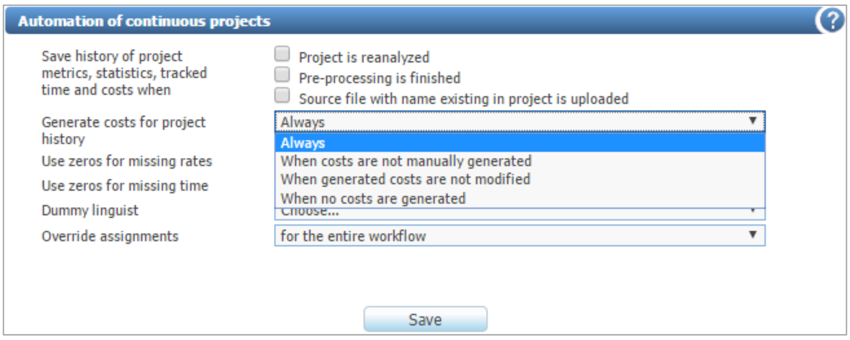
Check Workflow for detailed information how to generate EDC reports.

Contact XTM Support (support@xtm.cloud).to configure your custom payment matrix based on EDC scores.

Automation of continuous projects

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

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

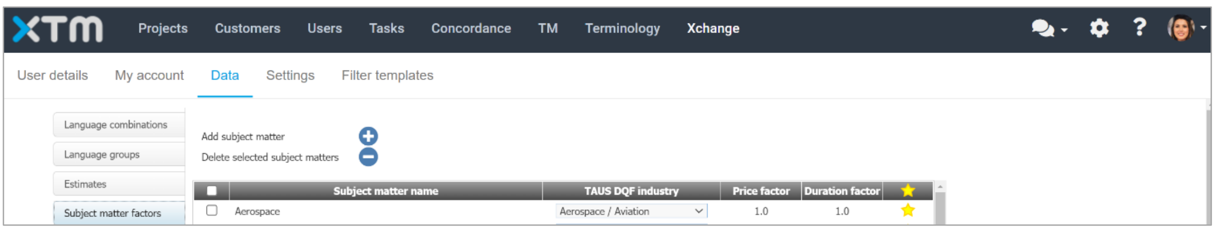


The options to generate costs for project history

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

Data - Subject matter factors

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

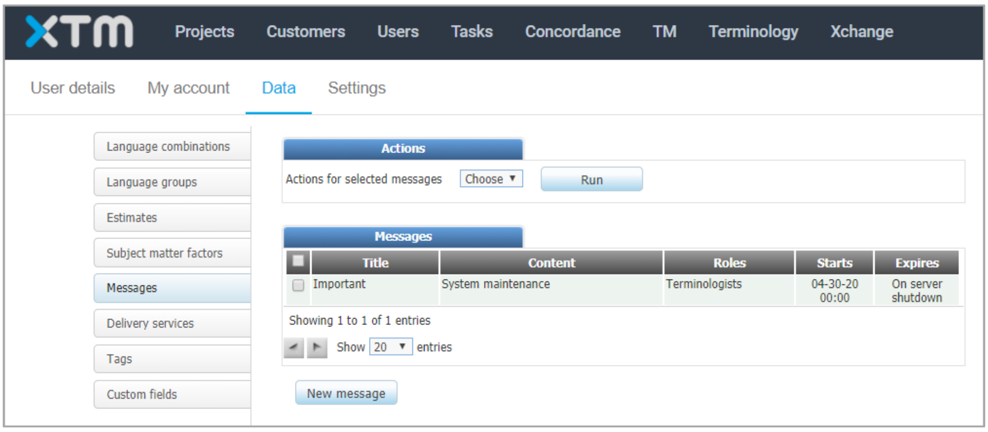


Setting the system default subject matter factors for XTM

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

Data - Messages

You can use this section to create a message to inform users about important issues. The message will pop up when the user logs on to XTM Cloud.



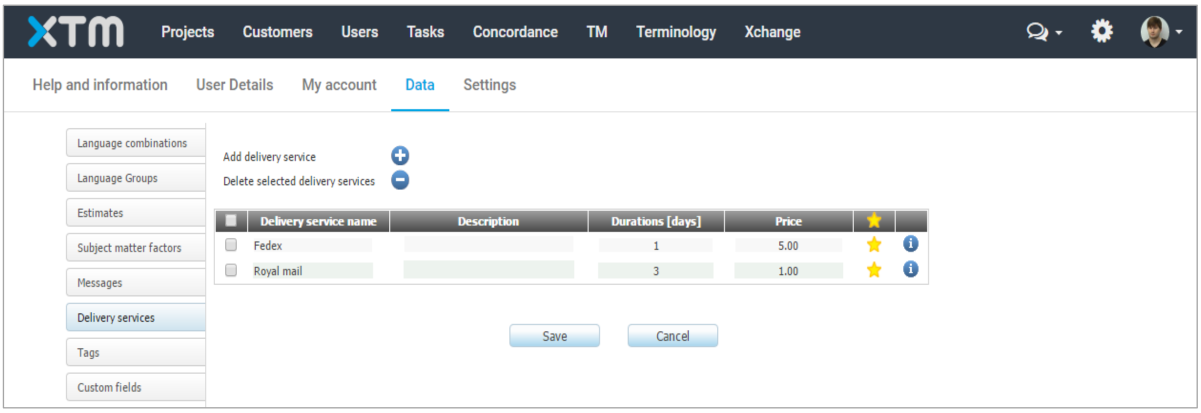
The message management window

Adding a new message

1. Go to Configuration > Data > Messages.
2. Select the New message button.
3. Enter the message details.
4. Click Save.

Data - Delivery services

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



Defining the available Delivery services for XTM Portal

Data - Tags

Tags Overview

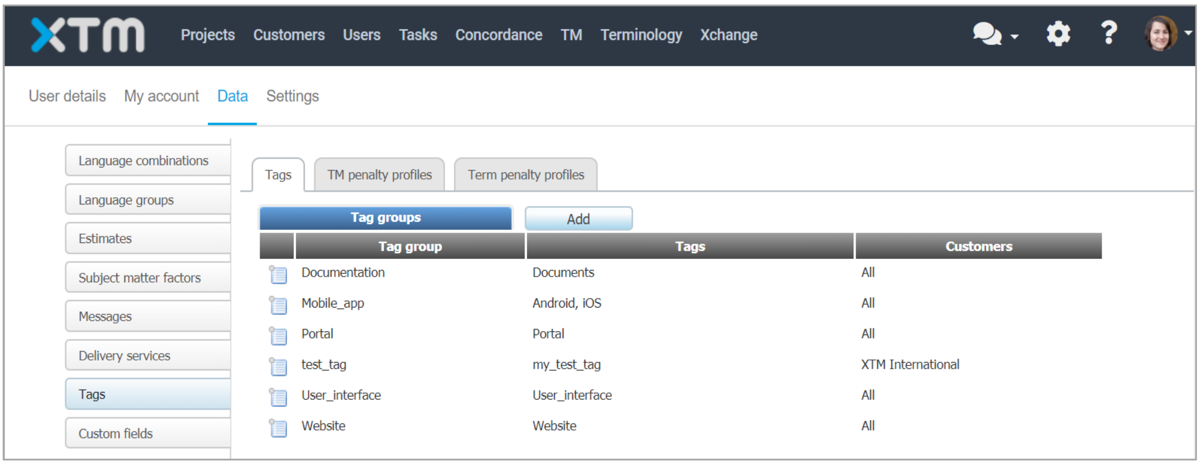
The Tags tab is used to create tag groups with the associated tags and to set up TM and term penalty profiles.

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

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

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

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



The listing of Tag Groups with their associated tags

Adding and editing tags

To add a new tag group and the associated tags:

1. Go to Configuration > Data > Tags.
2. Click the Add button.
3. In the popup, enter the tag group name and then enter the individual tags. Both the tag group and the tags can be available for all customers or can be customer specific.
   If you uncheck the All customers checkbox then you can choose for which customers, you want the tag group and tag to be available.

Note: XTM will automatically replace spaces with underscores.

Data - TM penalty profiles

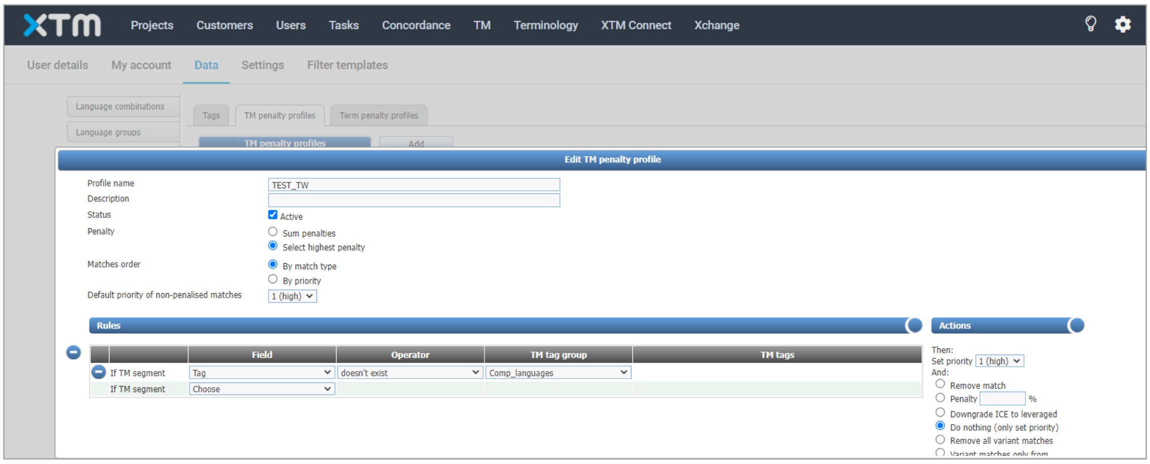
A TM penalty profile enables you to select certain TM from the XTM database based on their tags and tag groups and then penalize the match during the analysis of the source file.

Creating new TM penalty profile

- Go to Configuration > Data > Tags > TM penalty profiles > Add.
- In the Edit TM penalty profile
- Enter a penalty profile name and optionally a description.
- Select the Active checkbox.
- Select one of the Penalty options:
- Sum the penalties.
- Select highest penalty: only use when a segment is affected by more than one penalty.
- Select Matches order:
- By Match type
- By priority
- Select Default priority of non-penalised matches
    a. Add rules for the penalty profile. You can add multiple conditions within one rule.
    b. In Actions section on the right:
- Set priority.
- Select Variant matches only from > Select the required language variant from the dropdown.
- Select Save.

Editing, deleting, and deactivating TM penalty profile

1. Go to Configuration > Data > Tags.> TM penalty profiles.
2. Select the context menu icon in the first column of the table.
3. Select the required option.
4. Click Save.



Editing TM penalty profiles

Penalty profiles rules: available options

Field	Comparison
All tags	All the tags for a segment in the XTM TM database against the tags chosen for this project
None of the tags	None of the tags for a segment in the XTM TM database against the tags chosen for this project
Customer	The customer for a segment in the XTM TM database against the project customer
Status	The XTM status of a segment in the XTM TM database can be either approved or not approved
XLIFF:doc status	The XLIFF:doc status of a segment in the XTM TM database: 1: Rejected 2: New 3: Translated 4: Proofed 5: Validated
Target language	The target language for a segment in the XTM TM database against the target language chosen for this project
Match type is ICE or leveraged	The match is either an In-Context Exact match or a leveraged match.
Tag	One of the tags for a segment in the XTM TM database against the tags chosen for this project
Any tag	Any of the tags for a segment in the XTM TM database against the tags chosen for this project
Match type is variant	The match comes from a translation memory that is a different variant of the target language specified in the project.
Project target language	The match comes from the same target language specified in the project.
Segment ID	TM match for a segment with or without a segment ID

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

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

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

Note: Penalties must be within one rule for the language variant penalty profile to apply.

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

Creating a penalty profile for language variants

You can set a penalty profile which distinguishes between variants of a given language.

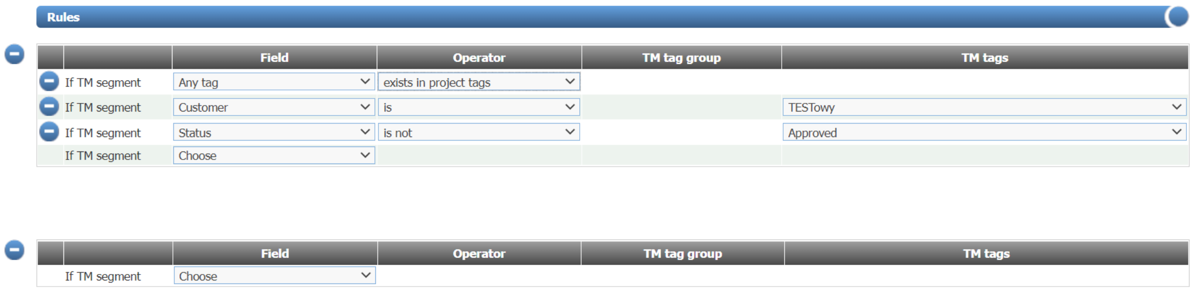
Note: TM language variant penalty profile supersedes any other TM penalty profile chosen at project level!

The available language variants for penalty profiles

- Arabic
- Dutch
- English
- French
- German
- Italian
- Portuguese
- Spanish

1. Go to Configuration > Settings > Translation > TM > Matches – general. Select the required language. You can enable any, or all of them if needed.
2. Go to Configuration > Data > Tags > TM penalty profiles > Add.
3. In the Edit TM penalty profile
4. Enter a penalty profile name and optionally a description.
5. Select the Active checkbox.
6. Select one of the Penalty options:
    a. Sum the penalties.
    b. Select highest penalty: only use when a segment is affected by more than one penalty.
7. Select Matches order:
    a. By Match type
    b. By priority
8. Select Default priority of non-penalized matches.
9. Add a single rule for the language variant penalty profile. You can add multiple conditions within one rule.
   Note: Penalties must be within one rule for the language variant penalty profile to apply.
10. In Actions section on the right:
    a. Set priority
    b. Select Variant matches only from > Select the required language variant from the dropdown.
11. Select Save.
12. Go to Configuration > Settings > Translation > TM > Matches – general. Select TM language variant penalty profile and the newly created penalty profile from the dropdown. Select Save.

Result: You can add this penalty in the **Project Editor** or during project creation.



Adding multiple in one penalty profile rule. Second rule is empty.

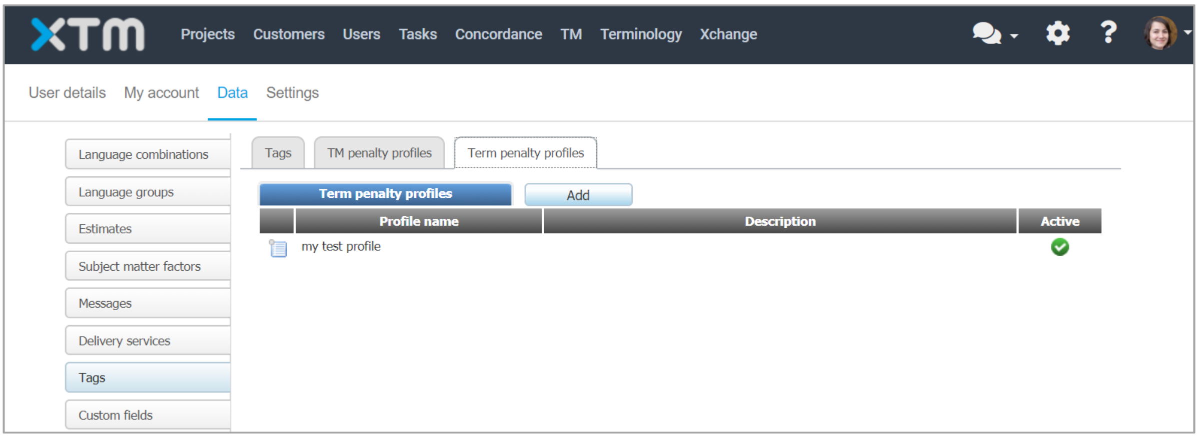
Adding penalty profile in the **Project Editor**

1. Go to Projects > Select the required project > General info.
2. Select TM language variant penalty profile > Select the language variant penalty profile from the dropdown. Select Save.

Result: TM penalty profile works only on the language variant. It supercedes all other penalty profiles. Other penalty profiles work on the remaining languages if present in the project.

Data - Term penalty profiles

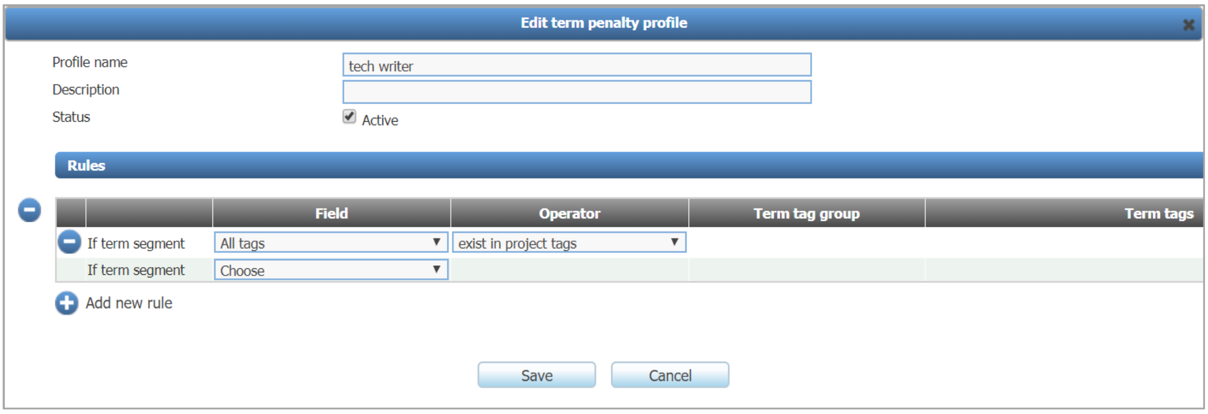
In a similar way to the TM penalty profiles described above it is possible to apply a penalty to term matches.



The list of existing term penalty profiles

Adding a new term penalty profile:

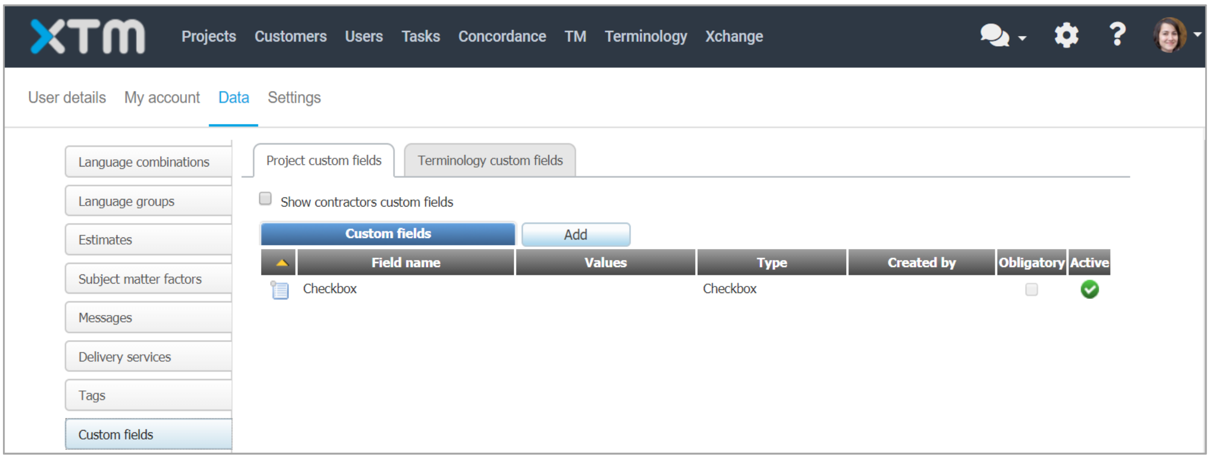
1. Go to Configuration > Data > Tags > Term penalty profiles.
2. Click the Add button.
3. Enter a penalty profile name and, if desired, a description.
4. Click the check box to make it active.
5. Select a tag group, operator and term tags. The only penalty available is to remove the term and it will not be highlighted in XTM Workbench.
6. Click Save.



Adding a new term penalty profile

Data - Project custom fields

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



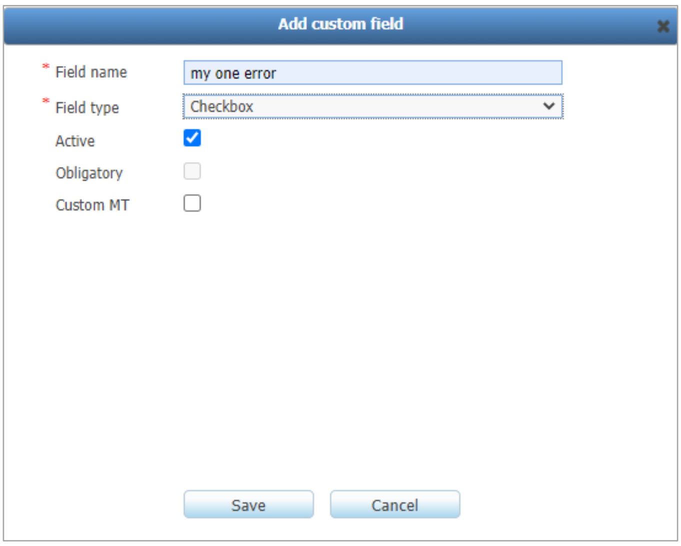
List of existing Project custom fields

To add a new Project custom field:

1) Select the Add button and enter a field name.
2) Choose one of the 6 different types of custom fields:
    - Checkbox
    - Date
    - Dropdown
    - Multiple selection
    - Number
    - Text field

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

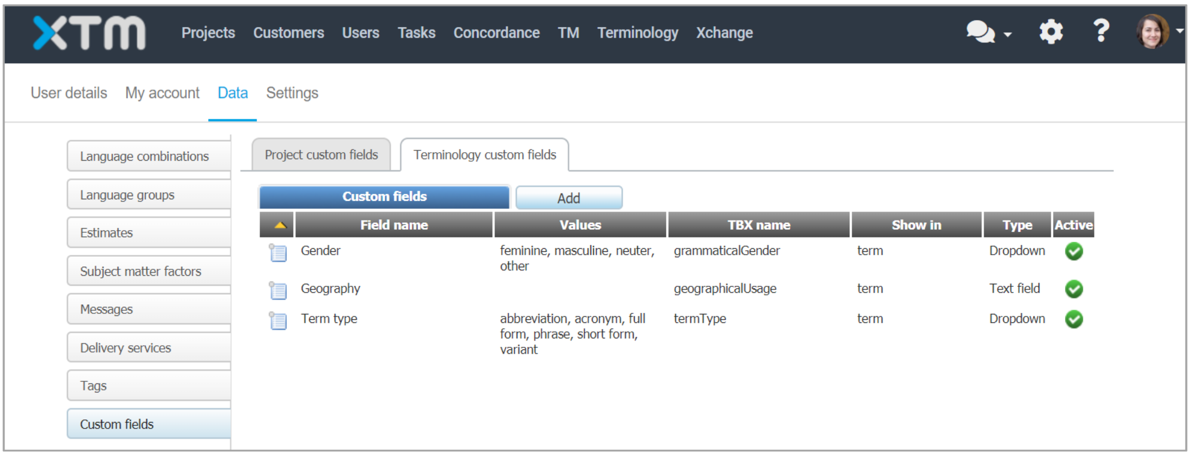
3) Set the custom field to Active, decide if you want it to be obligatory.
4) Check the Custom MT checkbox, if the custom field is to be available in your customized machine translation engine (more about Custom MT see here).
5) Click Save.



Adding a new Project custom field

Data – Terminology custom fields

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



List of existing Terminology custom fields

To add a new Terminology custom field:

1) Select the Add button and enter a field name.
2) Choose one of the 5 different types of custom fields:
   - Dropdown
   - Hyperlink
   - Multiple selection
   - Number
   - Text field

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

3) Click Save when you have defined the custom field.

Note: TBX name refers to the term property when it is exported to a TBX file. The concept or term radio buttons enable you to define where the field should be displayed. The Active checkbox allows you to activate or deactivate this custom field.

Settings

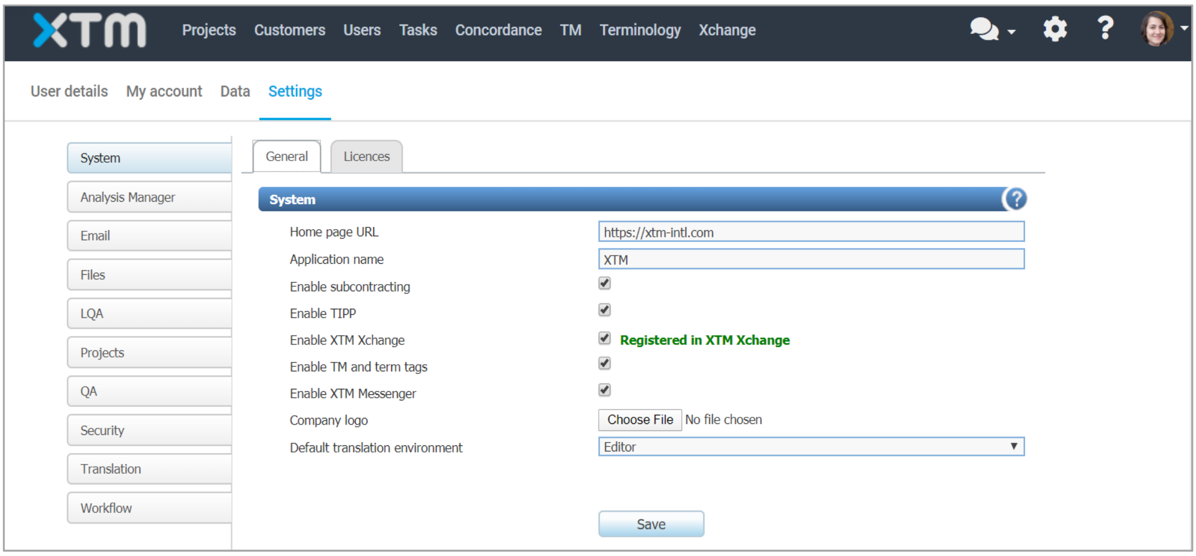
Many of the setting in XTM can be configured at the system level and then adjusted as required at the customer and project level.

Settings - System

General

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

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



Settings – System – General tab

Licenses

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

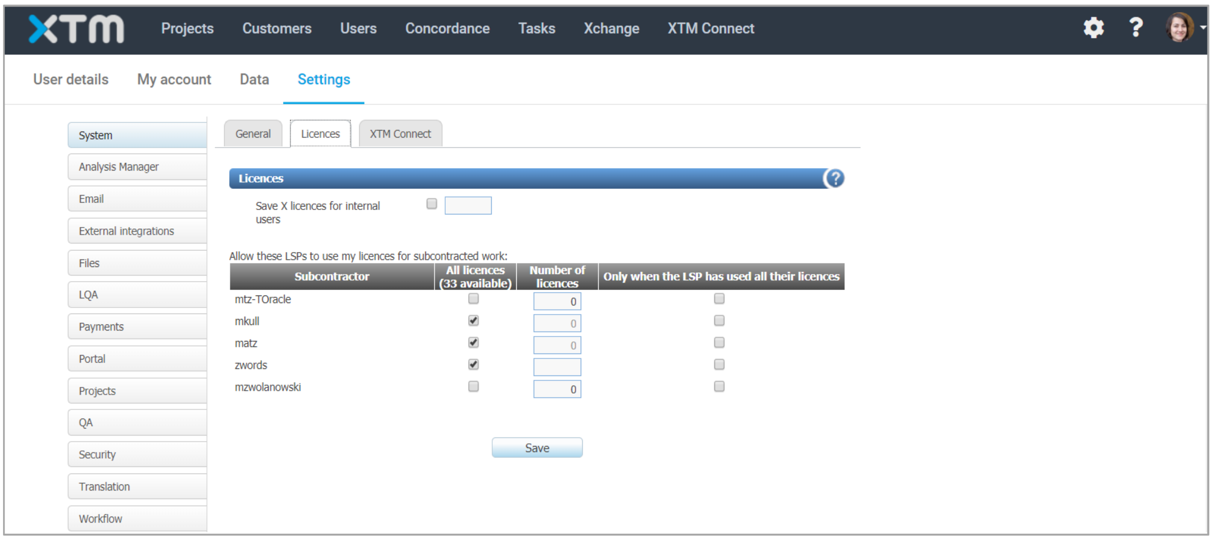
- Have purchased an XTM subscription and use their own licenses.
- Have signed up for a free account and use your license.
- Use a combination of their own license and your licenses.

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

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

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

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



Settings – System – Licenses tab

Settings - Analysis manager

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

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

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

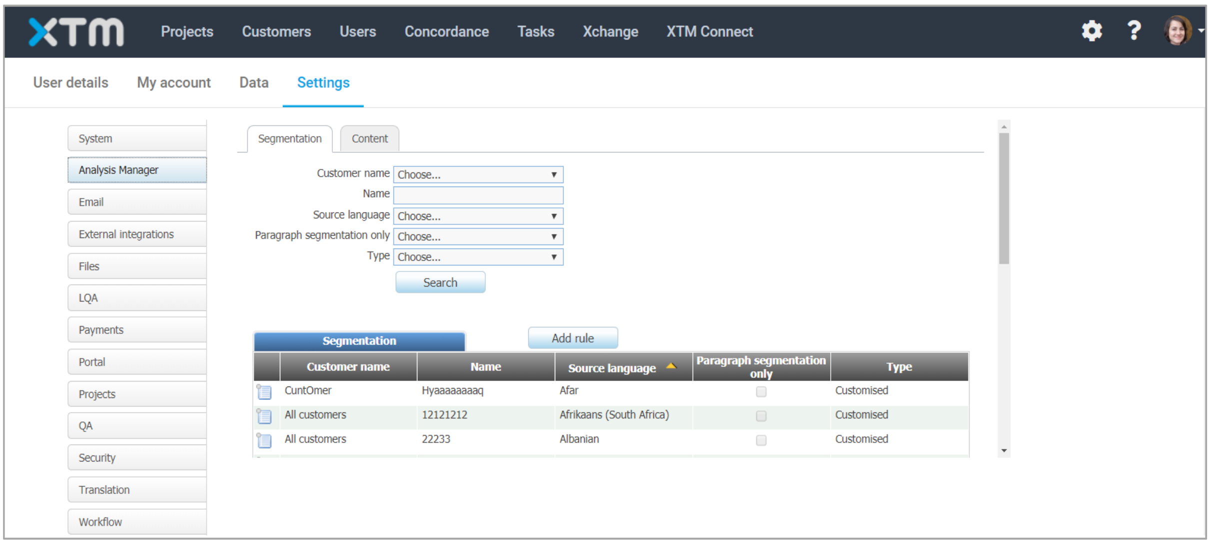
Segmentation

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

XTM supports three levels of SRX rules configuration:

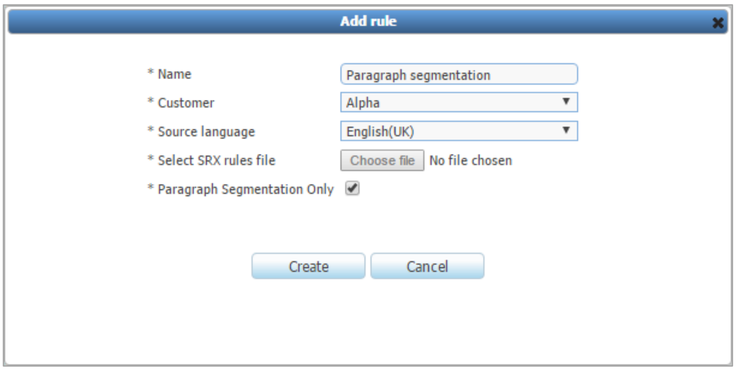
1. The default configuration provided with XTM.
2. A customized set of rules for your particular instance of XTM (system default)
3. A customized set of rules for individual customers

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



Server settings – Analysis manager – segmentation

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



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

Content

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

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

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

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

XTM supports three levels of ITS rules configuration:
1. The default configuration provided with XTM.
2. A customized set of rules for your particular instance of XTM (system default)
3. A customized set of rules for individual customers

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

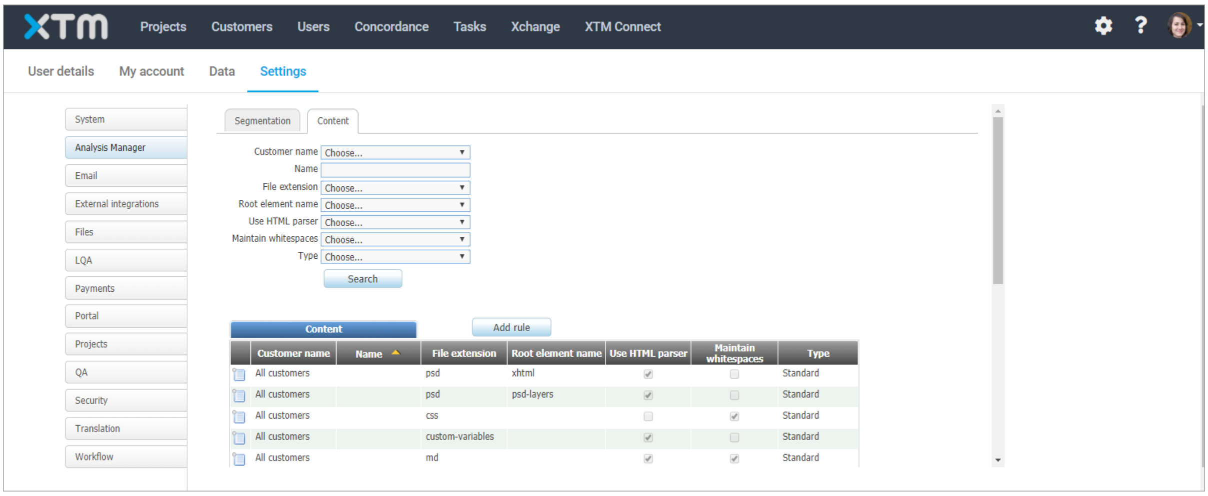
1. Initially XTM checks to see if there is an appropriate rule in the customer's configuration file.
2. If there is no rule for the customer's configuration XTM searches in the system's configuration.
3. If there is no rule for the system, XTM searches in the default configuration.
4. If there is no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

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

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

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

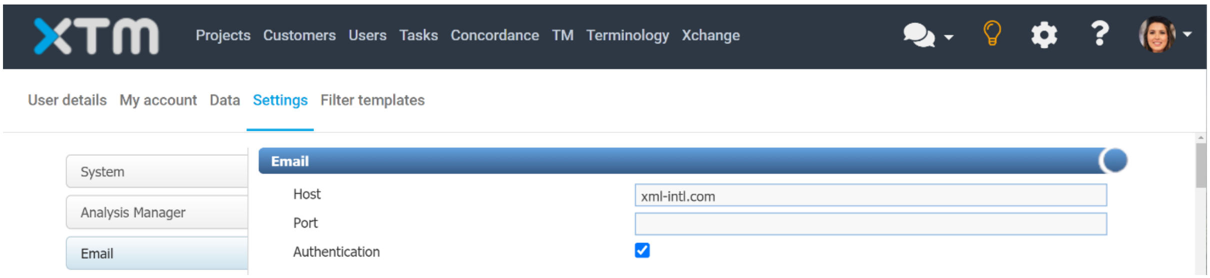
For examples of ITS rules, go to the ITS rules chapter.



Server settings – Analysis manager – content

Settings - Email

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



Server settings – Email tab

The email settings are:

Host – This is the address of the email server. The XTM server is set by default. It does not require authentication because emails will be sent from XTM International's internal server. If you experience problems with spam messages, we recommend you set your own mail server

Port – This is the port number to use during connections with the email server.
Authentication - If this option is checked then messages are sent from the email address (user, password will be checked). If not checked then messages are sent from the specified mail server without authentication.
User – This is the name of the email account which is used to send messages.
Password and re-enter new password - These fields allow you to change the password for the specified email account.
TLS – If this option is checked then the TLS protocol is used with SMTP host communication.

Mail subject prefix – Text entered here will prefix all email subjects. This may be useful to set up email filters.
Default email sent from – name – The sender's name will be displayed in the "From" field in the email as the email account name.
Default email sent from – address – The sender's email address that will be displayed in the "From" field in the email as the email account address.
Workflow emails sent from name – Select one of the 3 options. The default value entered above, the users first name and last name or the users Username
Workflow emails sent from address – Select one of the options. The default value entered above or the users email address.
Attach contact footer - If checked then footer will be attached to the email. The footer contains the information that message was automatically generated, can be ignored and website URL to see for more details.

Send copies of all emails to Administrator – check this box to activate.
Send workflow emails to linguists even when the project is not started – notify linguists that they have been assigned to or unassigned from a project that has not been started.

Use due date of one workflow step as a start date of the next – specify due dates for workflow steps to indicate when next workflow steps will begin.
Sort tasks in linguist emails by – choose whether tasks should be sorted by file names or the task status in emails to linguists.
Show all assigned tasks in linguist email (not only changed) – activate this option to send notification emails to linguists that include all their assigned tasks.
Do not list unchanged jobs in linguist emails when project consists of more than – use this option to hide unchanged jobs from the list when the number of jobs to show in emails to linguists exceeds the number selected from the dropdown list.
Show all jobs in PM email (not only changed) – activate this option to send notification emails to project managers that include all project tasks in their management.
Do not list unchanged jobs in pm emails when project consists of more than – use this option to hide unchanged jobs from the list when the number of jobs to show in emails to project managers

exceeds the number selected from the dropdown list.
Do not use PM notifications for limited PMs – activate this option to reduce the number of notification emails sent limited project managers.
Group tasks in emails to PMs by – choose whether tasks should be grouped by file names or languages in emails to project managers.

Customizing emails

Company or application name

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

Specification of XTM Cloud e-mail notifications

E-mail notifications are constructed in HTML and contain two kinds of variables:

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

Customization of XTM e-mails performed by XTM Support

User interface

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

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

Email Variables

E-mails can include the following additional variables:

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

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

Email localization and changing of variable name

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

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

A change within one language:
English:

```
<text id="PROJECT_DETAILS">Project details</text>
```

English:

```
<text id="PROJECT_DETAILS">Project information</text>
```

Localization:
English:

```
<text id="PROJECT_DETAILS">Project details</text>
```

Polish:

```
<text id="PROJECT_DETAILS">Szczegóły projektu</text>
```

Localization of customized e-mail notification text

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

E-mail notification subject line

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

XTM visibility

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

Settings - Files

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

File upload

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

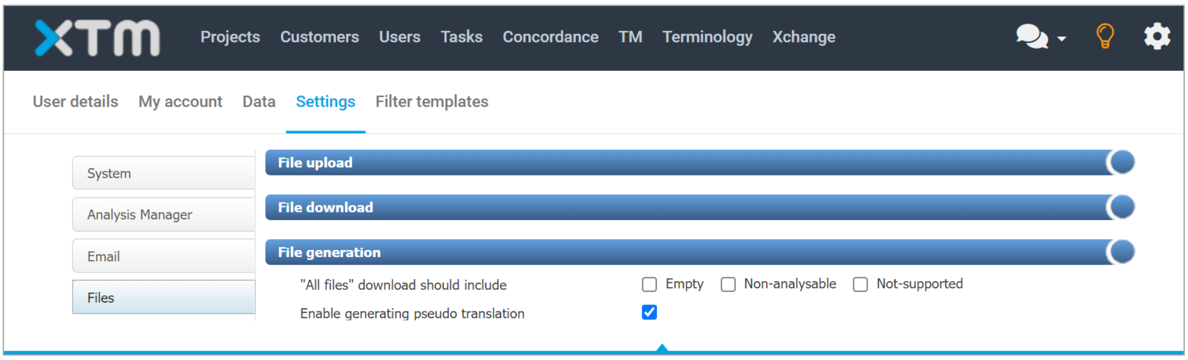
File download

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

File generation

The file generation section allows you to:

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



Server settings – Files tab

Settings – LQA

LQA

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

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

MQM provides a catalogue of over 120 issue types with definitions and examples. The hierarchy diagram of these issues is shown in20. Appendix 9: LQA - MQM Issue Hierarchy.

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

Weight: The importance that the administrator would like to give to a specific error. It is advisable not to apply any weight which is higher than 1.

Severity: another way to change the importance of a specific error.

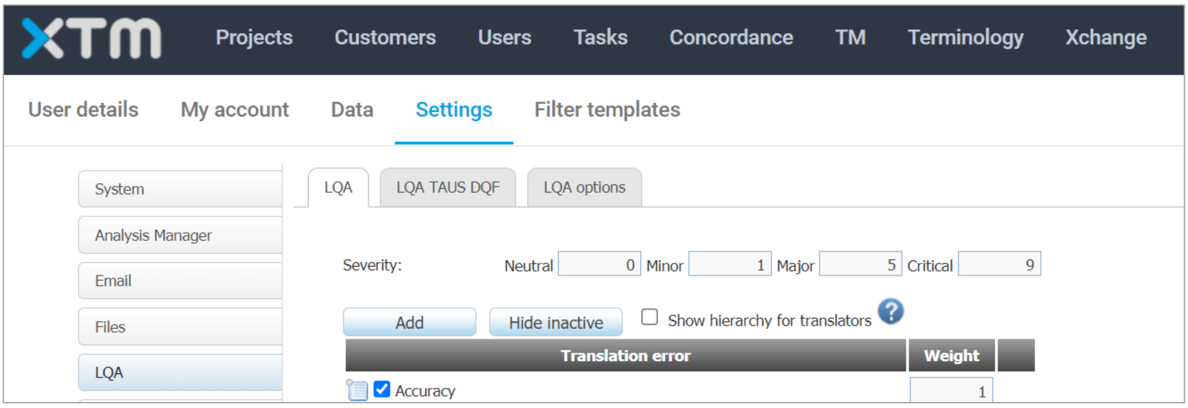
How is the LQA scope defined and how is it performed?
LQA scores will be calculated only in segments which were activated by a user in the **previous** project workflow step and by the LQA evaluator in the LQA step.

You can choose whether LQA scores will be based on source word count or target word count. Check LQA options section for detailed information.

You can add a specific LQA step to a workflow. You can choose to perform LQA as a part of another step (such as correct).

How does LQA differ from QA?

XTM offers different types of error checking. QA checks are performed automatically in Workbench based on a QA profile. LQA is always performed by a human linguist.



Configuring Issues for LQA

Changing the name of the LQA issue

In the Settings > LQA > LQA tab, select Details from the context menu > Edit translation error.

XTM will always retain the MQM name for reference.

You can also decide whether the issues are displayed in XTM Workbench and the report as a flat list or arranged in a hierarchy.

Adding a new LQA translation error category

1. Go to Configuration > Settings > LQA > LQA tab.
2. Select Add.

LQA options

XTM offers different methods of calculating LQA scores:

- Default: based on the number of words in the target text
- based on the number of words in the source text
- Reference word count (RWC): can be added to either of the other methods.

  The reference word count provides a standard document length for comparing accumulated penalty values. The reference word count gives a frame of reference for the penalty totals, for example, the number of error penalties per 1,000 words.

To configure the method of calculating LQA scores

Go to Configuration > Settings > LQA > LQA Options.

How are LQA scores calculated when based on the number of words in the target text?

*1- [Total LQA errors * (weight * severity) / target word count in evaluated segments]*

Example

LQA performed on	1500 target words
Total of LQA errors	3
weight	2
severity	5
Formula	1-[3 * (2 * 5) / 1500] = 0.98 = 98%

How are LQA scores calculated when based on the number of words in the source text?

*1-[Total LQA errors * (weight * severity) / source word count in evaluated segments]*

Example

LQA performed on	1500 source words
Total of LQA errors	3
weight	2
severity	5
Formula	1-[3 * (2 * 5) / 1500] = 0.98 = 98%

How are LQA scores calculated when based on the number of words in the target text and the Reference word count (RWC)?

[Total LQA errors(weight*severity)/ target text word count in evaluated segments] * RWC*

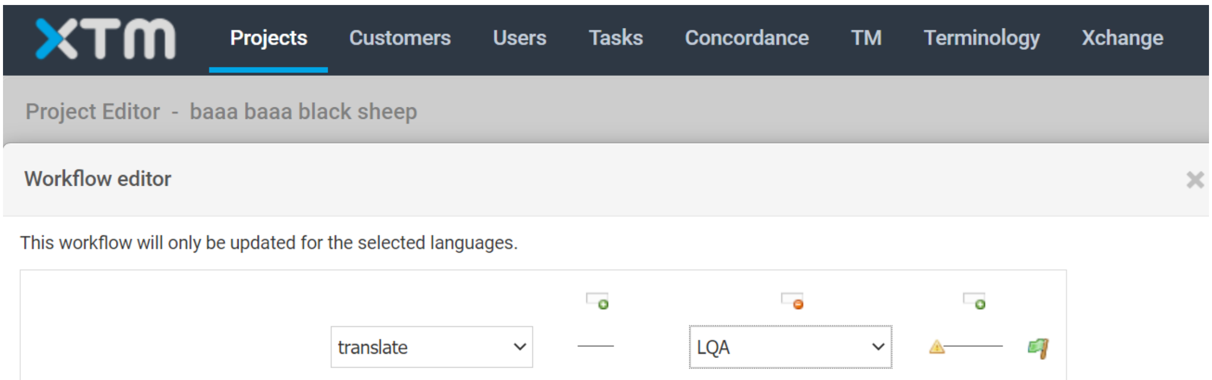
Example

LQA performed on	1500 target words
Total of LQA errors	3
weight	2
severity	5
Formula	100-[(3*(2*5))/1500]*1000=80=80%

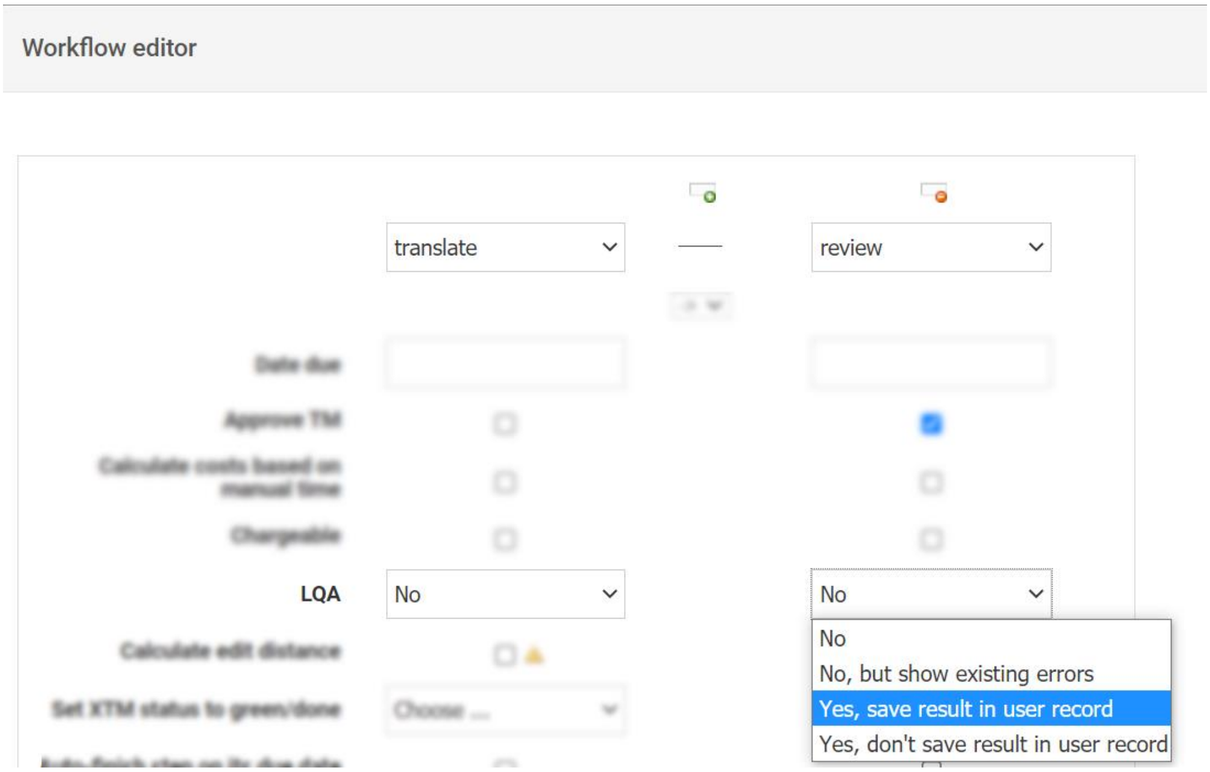
LQA Steps

You can add LQA to a workflow in the Workflow editor by:

1. Adding a default LQA step to a workflow.
2. Adding LQA to another workflow step.
3. Adding a custom LQA step to a workflow.



Workflow with a default LQA step



LQA integrated in another workflow step

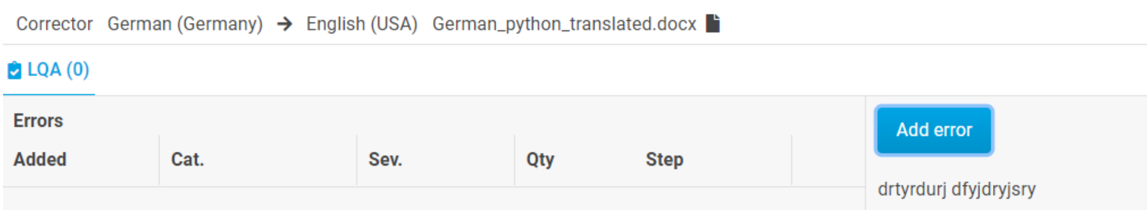
LQA in XTM Workbench

When LQA has been activated in a step, the LQA evaluator can access the LQA panel in XTM Workbench.

How to add a new LQA translation error in XTM Workbench?

The user with LQA evaluator’s rights can add LQA errors.

1. In the LQA panel, select the Add error button.
2. Choose the category and select the Add and close button.



Performing LQA in XTM Workbench

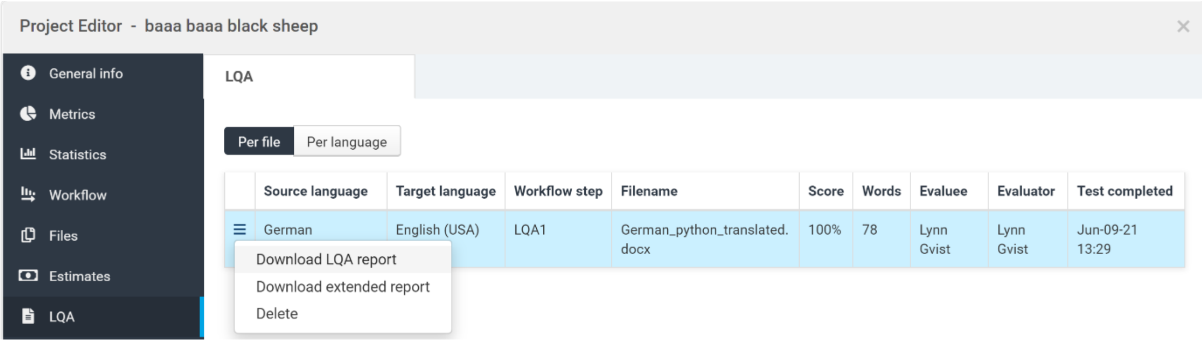
LQA reports

LQA reports is an Excel file listing LQA errors. Project managers can download various types of reports:

- user-specific: grouped by either file or language, simple or extended
- project reports: aggregated report for all users in a project, it doesn't include any information about the evaluee and evaluator

How to download LQA user reports?

1. Open the Project Editor > LQA.
2. From the context menu, select the required report:
   a. LQA report
   b. extended report



How to download LQA project reports?

1. In the Project list, select the context menu for the required project.
2. Go to Download > LQA report.

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

LQA report for non-hierarchical issues

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

LQA report for hierarchical issues

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

How is LQA penalty score (P) calculated in XTM:

Formula	*P = (Issuesminor × Minor multiplier + Issuesmajor × Major multiplier + Issuescritical × Critical multiplier)*

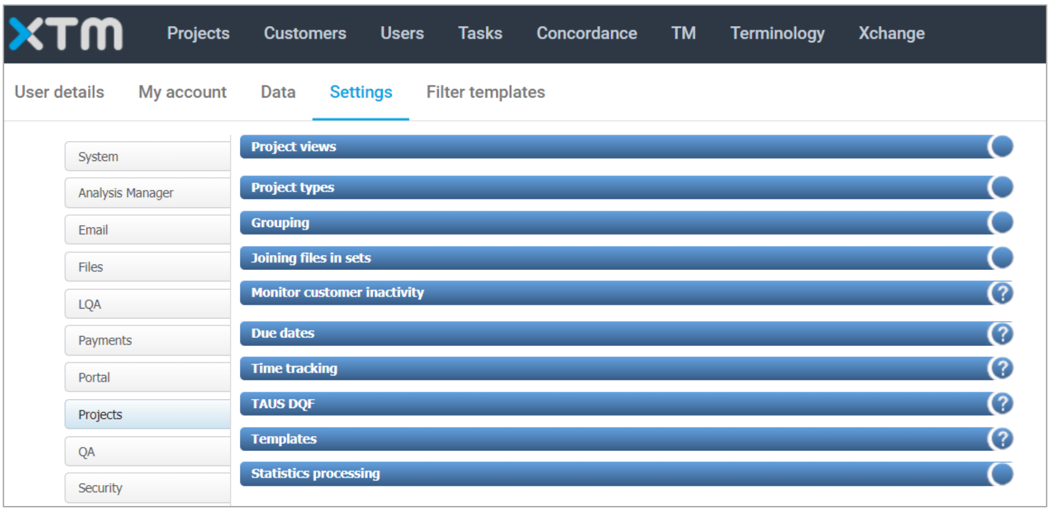
How is the Adjusted Penalty score (AP) calculated in XTM?

Formula	AP = P × Issue Type Weight

How is the Total score (TS) calculated in XTM?

Formula	TS = AP x100 / Word count

Settings – Projects



Projects tab

Project views

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

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

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

Project types

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

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

To activate alternative translations, check the boxes and enter the default number of alternatives. The settings entered here for the system can be modified for the customer and specific projects. When this option is active, XTM displays each source segment the specified number of times in XTM Workbench. There is a recommended translation followed by the set number of alternative translations, all of which can be completed by the translator. Each alternative translation has a field to enter a back translation. Additionally, the Alternative translation report can be generated and downloaded from Project Editor, Files tab, Previews. This gives an Excel file containing all the translations, back translations, and comments on one sheet.

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

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

Use Anonymization

The anonymization feature is based on Named Entity Recognition (NER) and it attempts to identify confidential personal data by converting it to inline tags. This applies to the following languages:

- Danish
- Dutch
- English
- French
- German
- Italian
- Portuguese
- Spanish
- Swedish

Protecting sensitive data during translation in XTM explains in detail how to use MS Word styles to convert sensitive data into inline tags during translation.

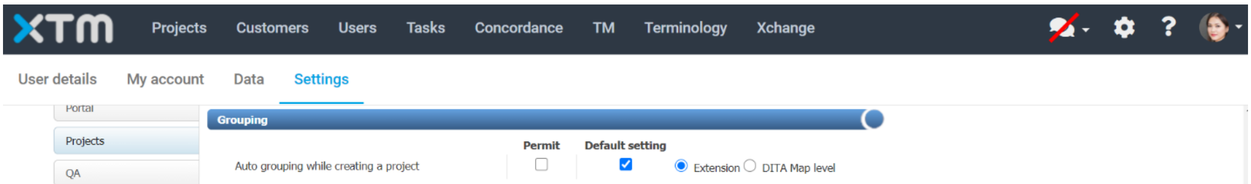
Auto grouping files

You can automatically group files during project creation. Files can be grouped by

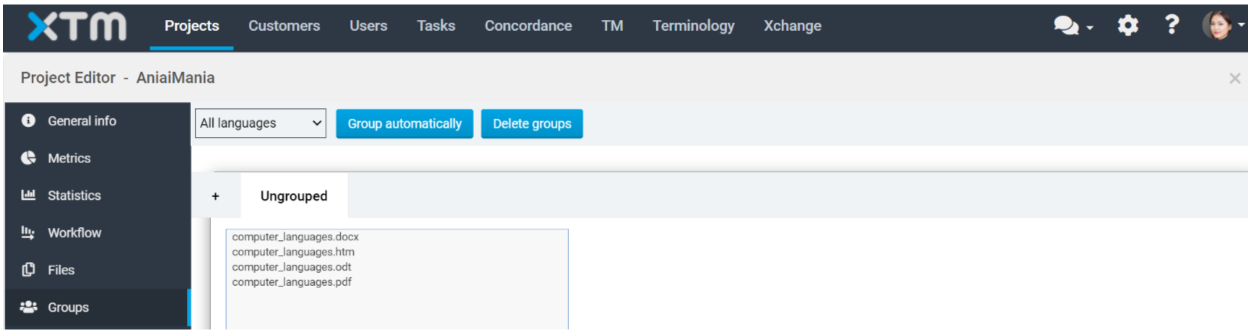
- file extension (for example: pdf, tbx, html)
- Number of files in one group
- number of groups
- DITA map

Enable auto grouping at the Project Settings level

1) Go to Configuration > Settings > Projects > Grouping.
2) Select Default setting.
3) Select one of the radio buttons to group files either by the Extension or by the DITA Map level.
4) *Optional:* for DITA Map level, enter the required level.
5) Create a new project as usual.
6) In the Project Editor go to Groups tab.
7) Select the Group automatically button.



Default setting grouping files options in Settings > Projects > Grouping



Project Editor > Groups > Group automatically

Enable auto grouping at the Add Project and template level

1) Go to Configuration > Settings > Projects > Grouping.

2) Select Permit. Grouping checkbox is added to Translation section in the Add project and Project template.

3) Create new project in Projects > Add project.

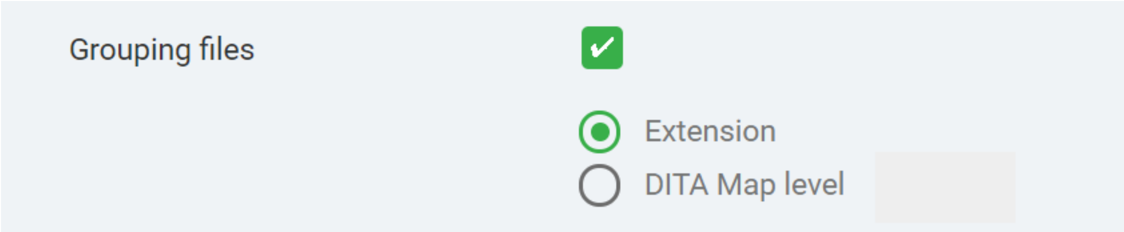
4) Fill in as required.

5) Under Translation tab, select Grouping files checkbox.

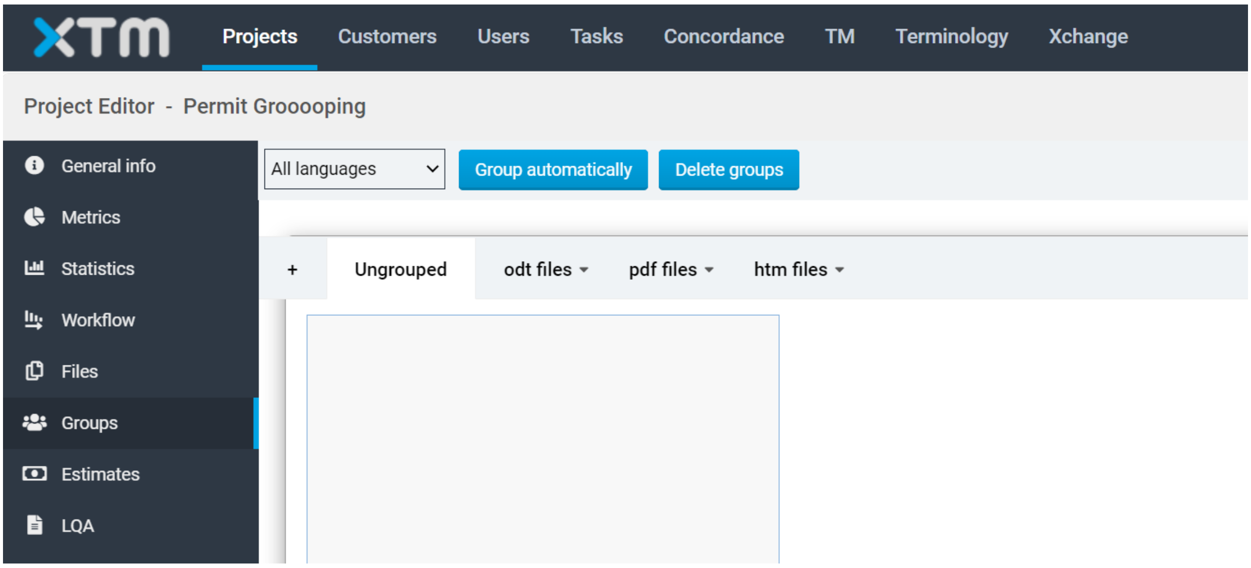
6) Select one of the radio buttons to group files either by the Extension or by the DITA Map level.

7) *Optional:* for DITA Map level, enter the required level.

Uploaded files are grouped according to the chosen criteria in the Project Editor > Groups tab.



Selecting auto grouping files options in Add project > Translation section



Grouped files in the Project Editor > Groups

Joining files in sets

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

Note: joining files is not working for Visual mode

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

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

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

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

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

Example 2
```
<topichead navtitle="b">
 <topichead navtitle="a">
  <topicref type="topic" id="a" href="topic/section/9.dita">
   <topicref navtitle="test section" type="topic" id="a"
href="topic/section/10.dita">
    <topicref type="topic" id="4" href="topic/section/11.dita"/>
    <topicref type="topic" id="4" href="topic/section/12.dita"/>
   </topicref>
   <topicref type="topic" id="a" href="topic/section/13.dita"/>
  </topicref>
 </topichead>
 <topicref type="topic" id="a" href="topic/section/14.dita"/>
</topichead>
```

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

XTM supports DITA packages with customized DITA root node names. Joined DITA files can be displayed in XTM Workbench according to the hierarchy defined in the DITA map.

Monitor customer inactivity

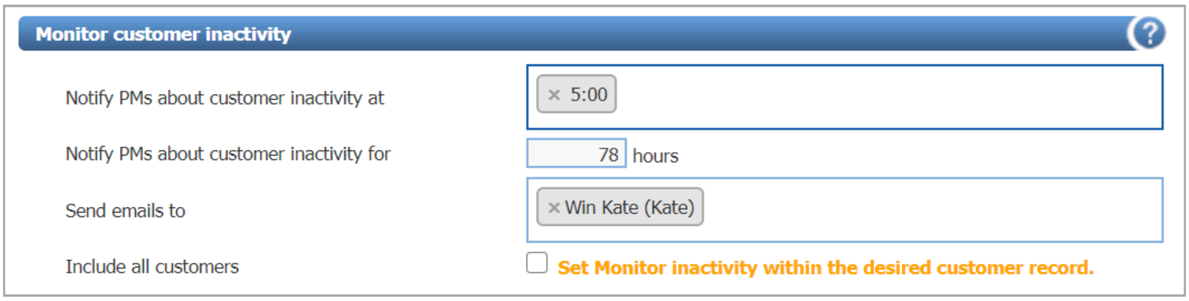
Inactive customers are accounts that have not created a project in XTM for a certain period. XTM Administrators can define this period of customer inactivity and decide if and when the Project Managers should be notified as soon as the customer becomes inactive.

Notify PMs about customer inactivity at – choose the time at which XTM will check for customer inactivity and send email notifications to Project Managers. The two actions are nearly simultaneous: the time lag between the two actions is 2 min. For example, XTM checks the inactivity at 2 pm and the Project Manager receives the notification at 2:02 pm.

Notify PMs about customer inactivity for – enter the customer inactivity period (in hours) that would trigger an email notification to the PMs.

Send emails to – choose the Project Managers who will receive the email notification

Include all customers – by ticking this checkbox, XTM will monitor inactivity for all customers



Monitor customer inactivity

If you want to monitor inactivity for selected customers rather than all customers, the Administrator or the PM needs to enable this option for each specific customer individually.

To monitor inactivity for selected customers:

In Configuration > Settings > Projects, deselect the Include all customers checkbox and save your choice.
Next, go to the Customers tab in the navigation bar and open the customer record of your choice.
Under the customer menu icon, select the Settings tab to access the Monitor customer inactivity section.
Select the Notify PMs if this customer is inactive checkbox.
Save your settings.

Note: If Include all customers option is enabled in the system configuration, the Monitor customer inactivity section will not appear in the Customers settings and you will not be able to activate this option for individual customers.

Due dates

This section allows you to manage the project due dates and the alert emails that are sent.

Default due dates to X days ahead – Allows you to set the default number of days from the current day that XTM will use to calculate the due date. You will be able to edit this default value during project creation if necessary. **Default the due time to** – Allows you to set the default time when the project is due. This value is added to the number of days that you have entered above. You have two options:

- The time defaults to the current time plus a number of hours.
- A specific time in the day.

Auto-calculate due dates for workflow steps – Allows you to automatically calculate due dates for project workflow steps based on selected days of the week rather than calendar days. If you tick this option, the Based on week days option appears where you can choose particular days of the week. By default, all days are checked, but the option works with at least one day checked.

Note: Project due dates are auto-calculated according to the time zone of the PM assigned to the project.

Send due dates email to – Enables you to select who you want to receive emails that alert them to projects either approaching or past their due date.

Send due dates emails at – Allows you to set when you want the emails to be sent out. This can be done multiple times during the day.

Include projects that are due to expire in the next X days – Enables you to set which projects you want to include in the email depending on how soon they will expire.

Time tracking

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

Enable manual time tracking for – Choose who can record the time spent working in XTM Workbench

Automatic time tracking – Check this box to track time automatically

Enable rush job – Check this box to enable the use of rush job premiums

Warn linguists if time not entered – If the time field is blank when finishing a task, display a window to enter a value

Synchronize time with subcontractors – allows you to receive time records from subcontractor or manually set time for step completion

Calculate punctuality rating – check this box to enable punctuality tracking for projects with at least one due date set

Punctuality score average calculation method – Choose the way punctuality score is calculated: either arithmetic (on-time deliveries as a percentage of all deliveries) or weighted (based on word count) method

Templates

Obligatory project template when creating a project – the option becomes available when at least one project template has been configured in the system. When the option is selected in the Settings, choosing a project template when creating a project becomes obligatory.

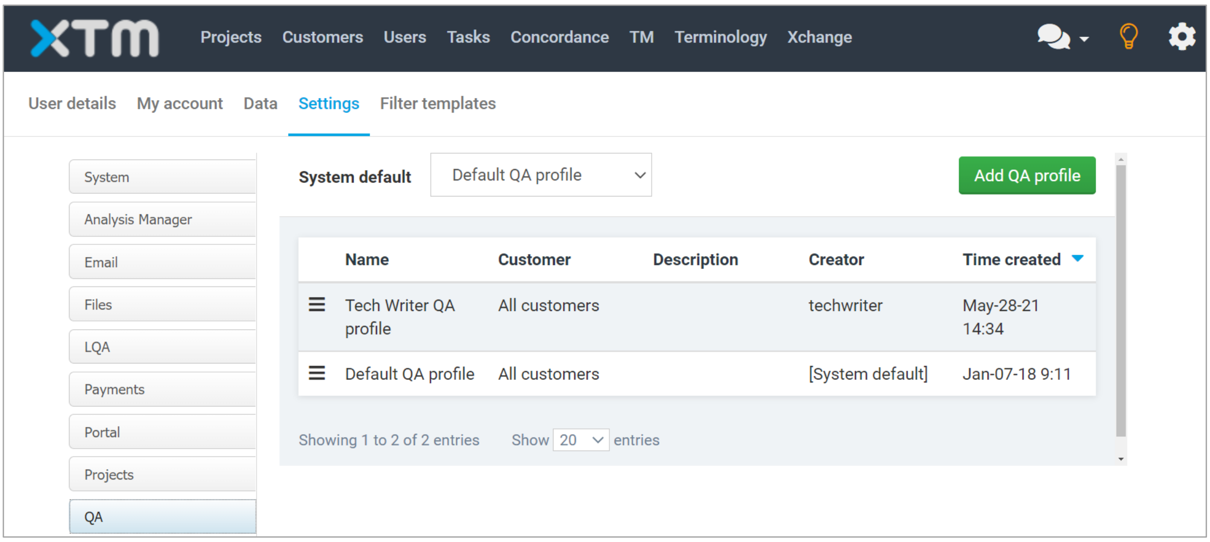
Statistics processing – the option lets you decide when project statistics should be processed. Instead of processing them when a workflow changes, you can have them updated once the whole project is finished or once a task is finished.

Settings - QA

QA profiles

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

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



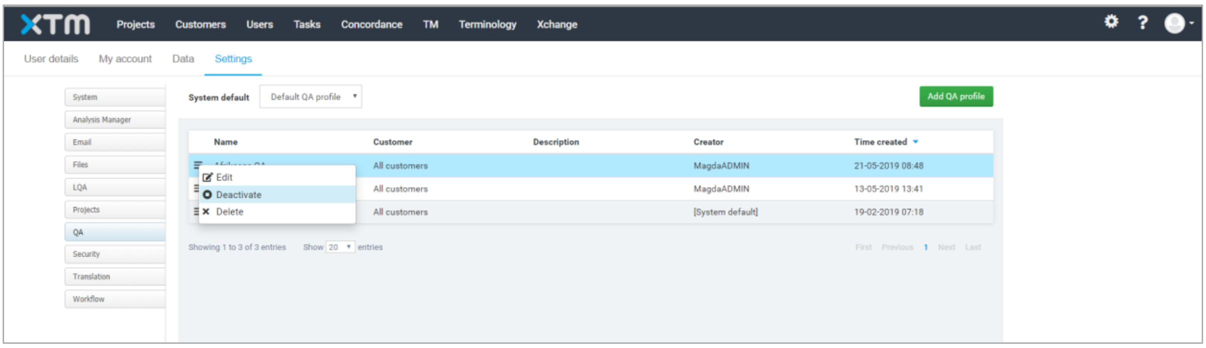
Configuration > Settings > QA screen

Language-specific QA settings

To specify language-specific settings:

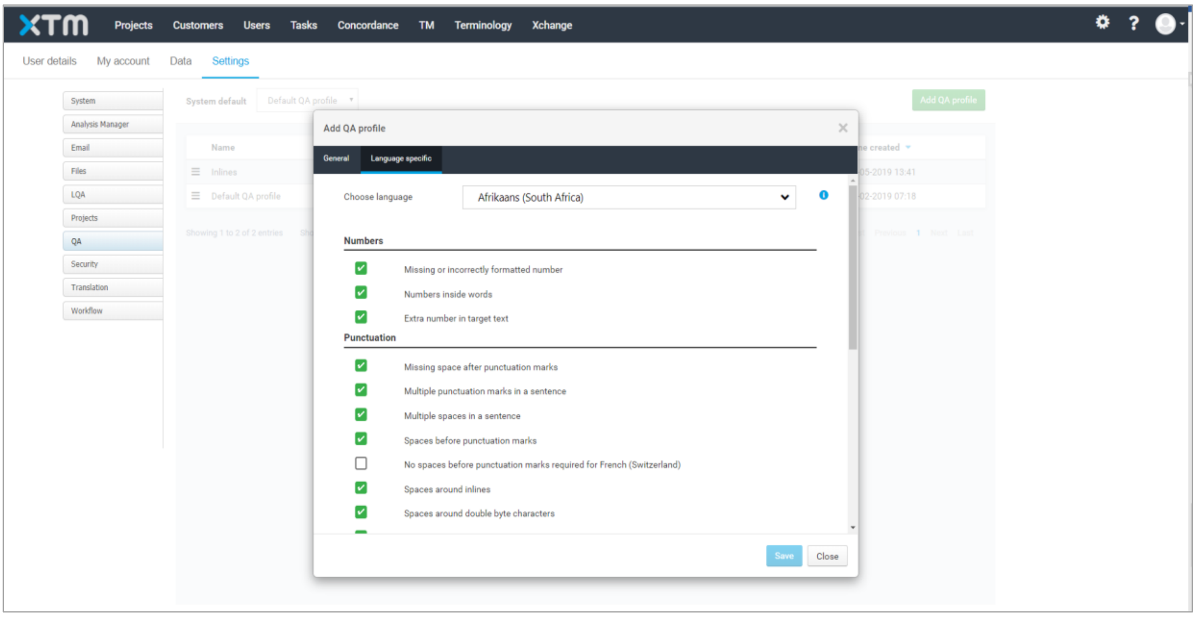
1. Go to the Add QA profile button to choose target languages in the pop-up.
2. Add a name of the QA profile and decide whether it should apply to all customers ("Global") or to selected customers.
3. Save your changes.

Once you have added a new profile with your preferred target language(s), a language specific tab appears next to the General tab in the Edit QA profile window.



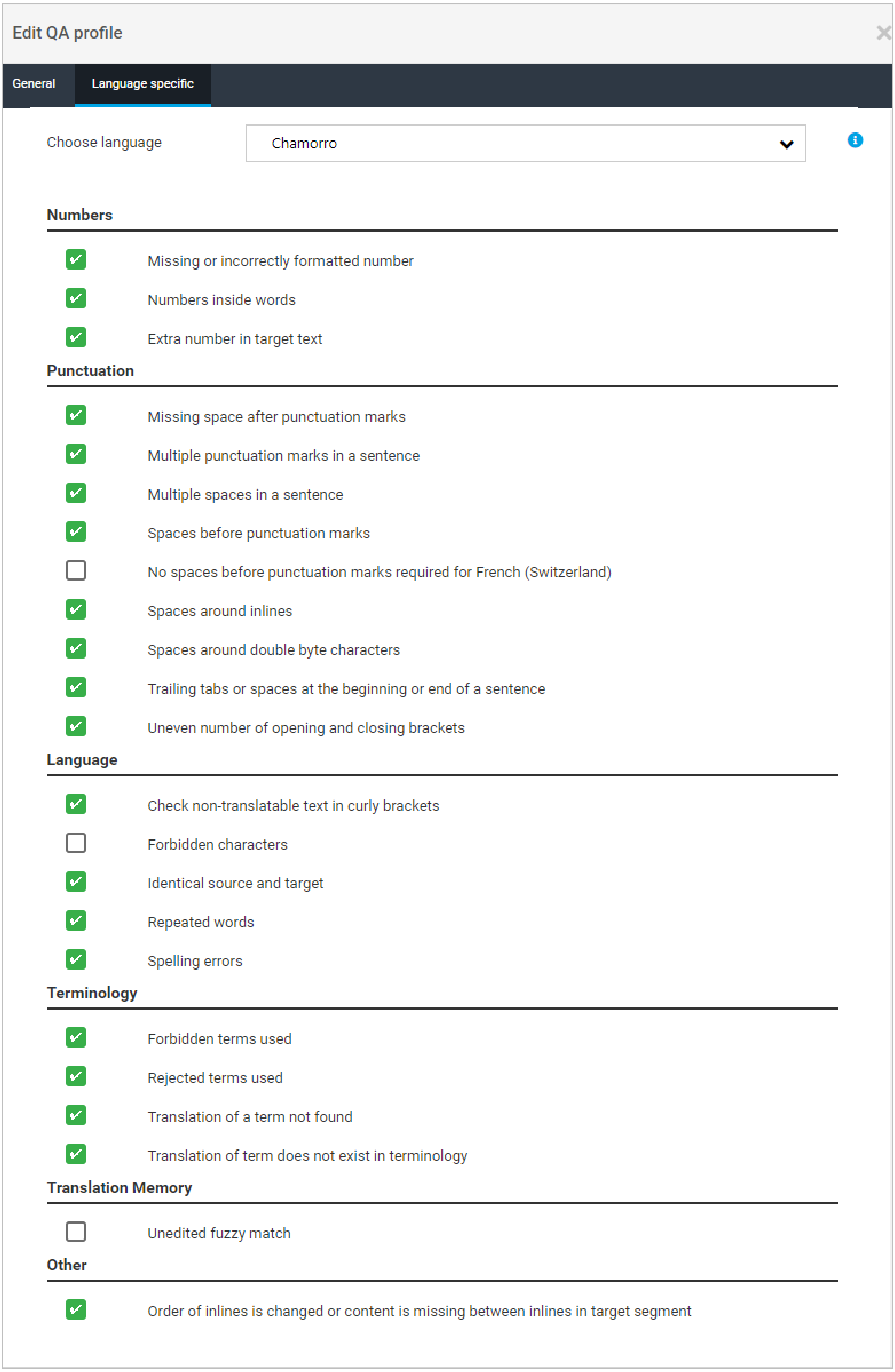
Edit profile view

Under the Language specific tab select the settings that will apply to the selected language and save the changes.



Setting a language specific profile

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



Language specific settings in QA profiles

QA options

In QA profiles you can select the following checks:

Numbers

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

Punctuation

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

Language

- Check non-translatable text in curly brackets
- Forbidden characters
- Identical source and target
- Repeated words
- Spelling errors
- Check grammar and style. Languages Supported by Grammar Checker

Terminology

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

Translation Memory

- Unedited fuzzy match

Other

Order of inline tags is changed or content is missing between inline tags in target segment

Adding Regular expressions to a QA profile

Regular expressions can be used to perform an in-depth quality assurance check. XTM Cloud provides a series of predefined regexes in the QA profile. You can also add your own custom regex. QA profiles can be global or customer-specific. You can assign just one QA profile to a project, but within that one profile it is also possible to add multiple QA checks.

Using a predefined regex:

Go to the configuration icon ⚙ > Settings > Add QA profile > Enter [QA profile name] > scroll down to the Regular expressions section > Select the relevant predefined regex (you can select multiple choices):

- Punctuation mismatch
- camelCase mismatch
- PascalCase mismatch
- UPPERCASE mismatch

Save the QA profile and add it whilst creating a new project or select it in the project General info section.

Using custom regex:

When using a custom regex, it is possible to select one of three matching types.

In the following example, the same regex validating an email is used.

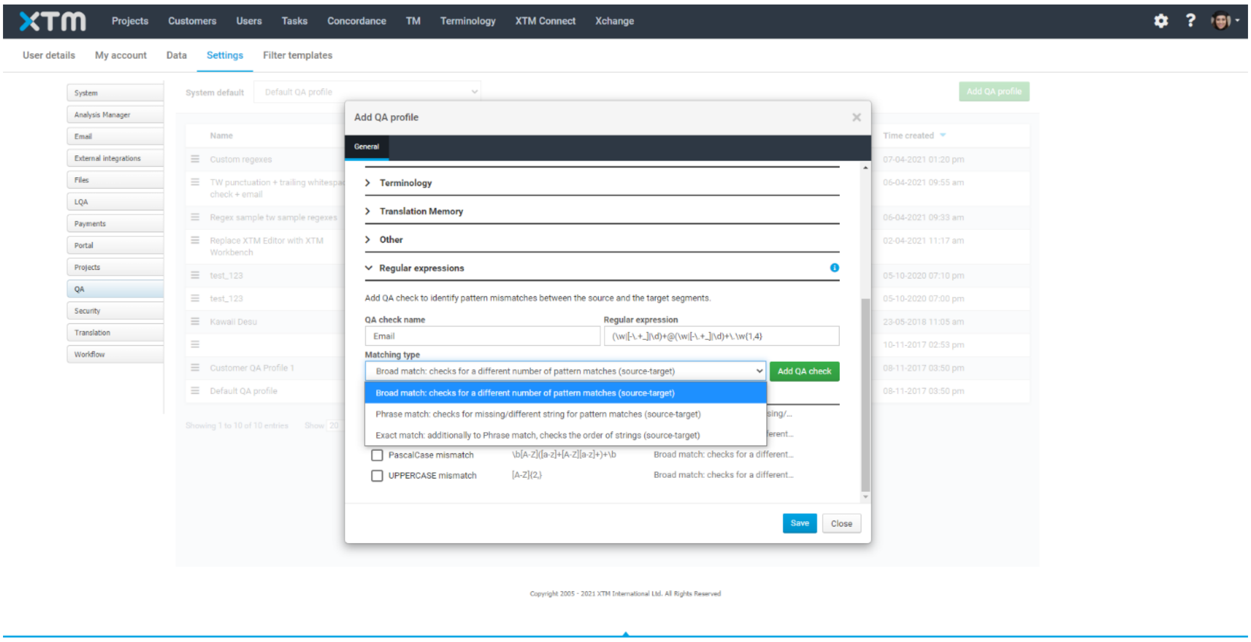
Regex pattern used: `\b[\w.!#$%&’*+\/=?^`{|}~-]+@[\w-]+(?:\.[\w-]+)*\b`

The table Examples of regex validation explains in more detail how the feature works.

Choose one of the matching types (broad match/ phrase match/ exact match) depending on the mismatches you want to identify. Warnings are displayed in XTM Workbench QA panel.

1. Select the configuration icon ⚙ > Settings > Add QA profile.
2. In the QA profile popup, add the name for your QA profile.
3. Scroll down to the Regular expressions section: Add a unique QA check name, then enter your regex and choose the matching type from the dropdown and save. The QA profile can contain several QA checks. To illustrate how the matching types work, take a look at the three QA checks for the same regex but with different matching types.
    a. **Broad match**: Broad match throws a QA warning for a different number of matches found in source and in target. The regex checks if we have a valid email address. In this case, the email address is missing @: it is not a valid address so it doesn’t match the regex - we get a warning.
    b. **Phrase match**: If an email address in the target varies from the source, a warning appears. In the example, support@xtm-intl.com in the source has been replaced with support@xtm.cloud - phrase match generates a warning which would have been omitted by the broad matching type.
    c. **Exact match**: A list of email addresses has to appear in the same order both in source and target. Only the exact matching check generates a warning for this type of error.
4. Once the relevant matching type has been chosen, save the QA profile and add it to your project.

You can add it during project creation or select it in the Project > General section.



Adding regular expressions to a QA profile

Examples of regex validation

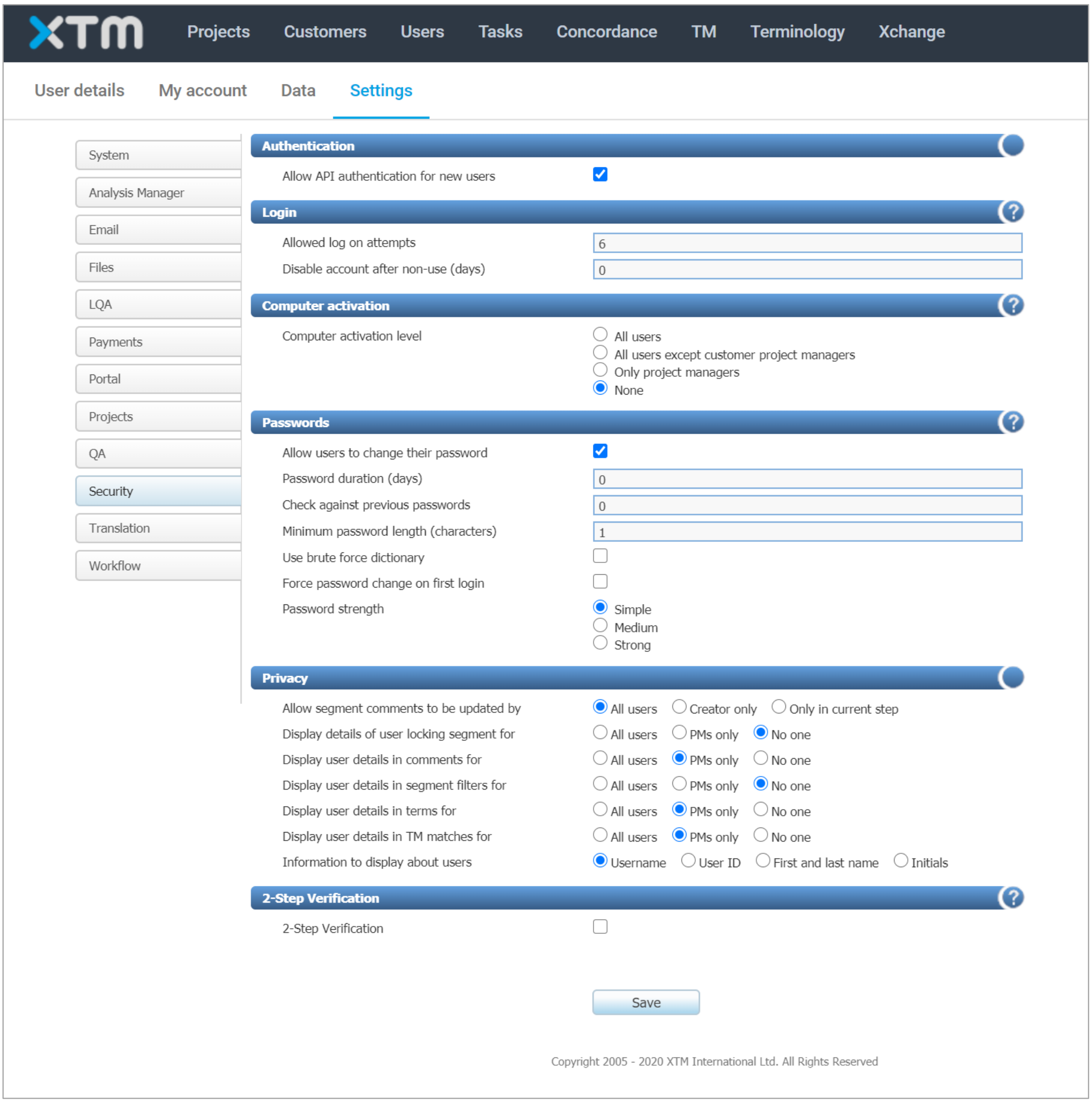
Regex pattern validating an email: \b[\w.!#$%&’*+\/=?^`{|}~-]+@[\w-]+(?:\.[\w-]+)*\b

Matching type	**Source text (EN)**	**Target text (EN) generating QA warning**
Broad match *Checks if an email address is included in the target*	To find out more, get in touch with our support team: support@xtm-intl.com	To find out more, get in touch support team: supportxtm-intl.com
Phrase match *Checks if an email address in the target is **exactly** the same as in the source*	To find out more, get in touch with our support team: support@cloud.xtm	To find out more, get in touch with our support team: support@xtm-intl.com
Exact match *Additionally to phrase match checks if the email addresses in target are **exactly in the same order***	You can also contact one of our agents: scully@xtm.cloud or mulder@xtm.cloud.	You can also contact one of our agents:mulder@xtm.cloud or scully@xtm.cloud

Settings - Security

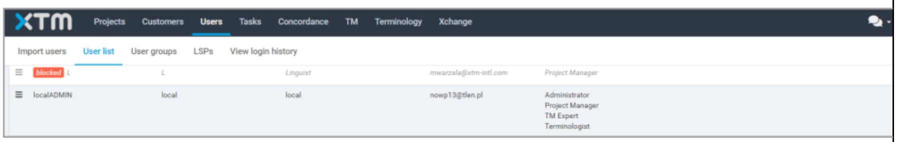
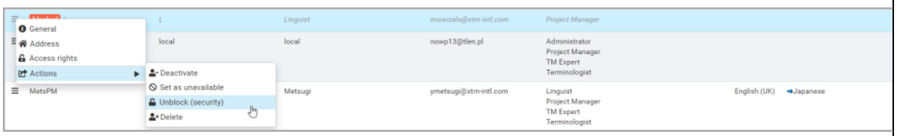
XTM is an extremely secure environment. XTM Cloud uses an SSL certificate to ensure secure communications via HTTPS and we recommend the same for all XTM Suite installations as this not only improves security but ensures compatibility when connecting different instances of XTM for subcontracting.

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



Configuration –Settings – Security tab

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

Feature	Description
Allow API authentication for new users	The function is enabled by default. With this function switched on, the Authentication section in Edit user > Access rights will appear only for users with PM roles. From here, Admins can decide on the way specific users can log in to XTM: via User Interface and API, via UI only, or API only. More on this: see here.
Allowed log on attempts	If the user makes the number of invalid logon attempts specified, then their account will be blocked, and they will not be able to access the system. In order to unblock the account, the Administrator needs to go to the Users tab and select Unblock account form the menu icon ☰ in the left-hand column of the users listing.  *Blocked account*  *Users tab > Unblock account*
Disable account after non-use (days)	If the user does not log into their account during the period of days specified, then the account will be blocked. The account will then need to be unblocked by the administrator as described above.
Computer activation level	This setting specifies who will need to go through the PC activation process on first log in. The process involves generating an automatic email with a link to download a cookie.
Allow users to change their password	Allows users to change the password which the Admin or PM assigned to them when creating user accounts
Password duration (days)	This field specifies the number of days that user passwords will be valid. After this period the user will have to change their password.
Check against previous passwords	This specifies the number of previous passwords that cannot be used as the current password.
Minimum password length (characters).	This specifies the number of characters required in the password.

<table>
<tr><th>Feature</th><th colspan="2">Description</th></tr>
<tr><td>Use brute force dictionary</td><td colspan="2">This dictionary defines the words that cannot be used as or in a password. By default, the following words and components are excluded:
• User’s first or last name
• Administrator
• Reviewer
• User
• Admin
• Test
• Super
• qwe
• 1111
• 111
• Password
• Translator
• XTM
• Guest
• Sys
• Pass</td></tr>
<tr><td>Force password change on first log in</td><td colspan="2">Check the box to enforce this measure</td></tr>
<tr><td rowspan="4">Password strength</td><td colspan="2">There are 3 levels of password strength which define the mixture of characters in the password. Characters are split into 4 groups:
• Upper-case letters
• Lower-case letters
• Numbers
• Non-alphanumeric symbols

The password strength is:</td></tr>
<tr><td>• Simple</td><td>Must use characters from at least 1 group.</td></tr>
<tr><td>• Medium</td><td>Must use characters from at least 2 of the groups.</td></tr>
<tr><td>• Strong</td><td>Must use characters from at least 3 of the groups.</td></tr>
</table>

Privacy

Use this section to define who can update segment comments and hide the names or details of other users of the system.

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

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

For each area there are three options:

1. Everyone can see the user information
2. Only project managers can see the information
3. No one can see the information.

Information to display about users

This option allows you to decide what information should be visible. The options are:

- Username
- User ID
- First and last name/ Initials

Using 2-Step Verification

2-step verification is an optional login method which provides additional security to your XTM account. Once enabled, you will be required to enter a specific code in addition to your username and password.

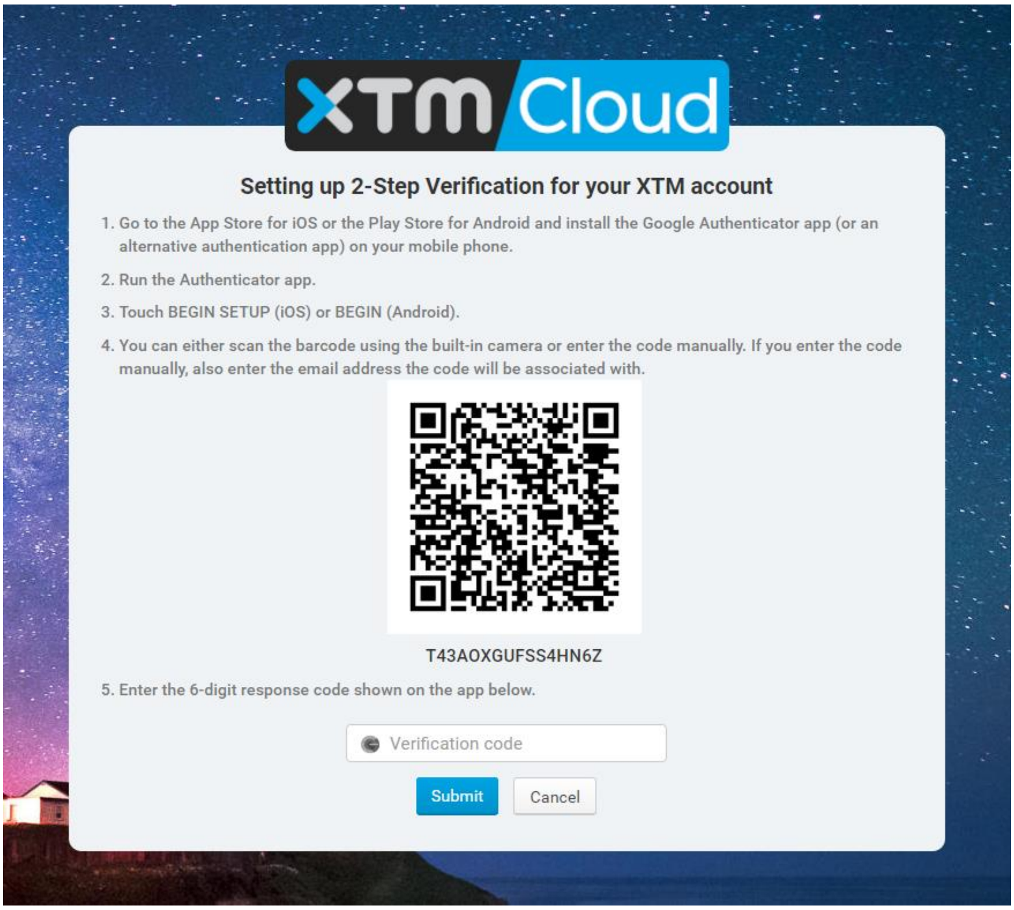
In XTM, the 2-step verification method uses a TOTP (Time-Based One-Time Password) algorithm which generates short-lived passwords based on the secret key created by our server. The passwords are valid for 30 seconds and cannot be reused after you have successfully logged in.

Note: When logging in, make sure that the clock on your device is synchronized with your service provider's network.

If you would like to enable the 2-step verification on your account, follow the steps described below.

Configuring 2-step verification on your account

1. Go to Configuration > Settings > Security.
2. Tick the Use 2-step verification checkbox.
3. Save your changes.
4. Log out from XTM.
5. Try to log back into XTM. You will see the "Setting up 2-Step Verification for your XTM account" screen.
6. Follow the on-screen instructions. You will be prompted to install a free-of-charge Google Authenticator app (iOS/Android), but you may use any other TOTP tool for 2-step verification.
7. Download the app, run it, and follow the in-app instructions to set it up (for Google Authenticator app see here). The app will display a verification code. Enter the code into the Verification code field and click Submit.



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

The next time you log in to XTM, the login form will include a Verification code field. You will have to enter the code from your app besides your standard credentials.

Note: When logging in next time, your credentials will not be required if cookies are enabled in your browser.

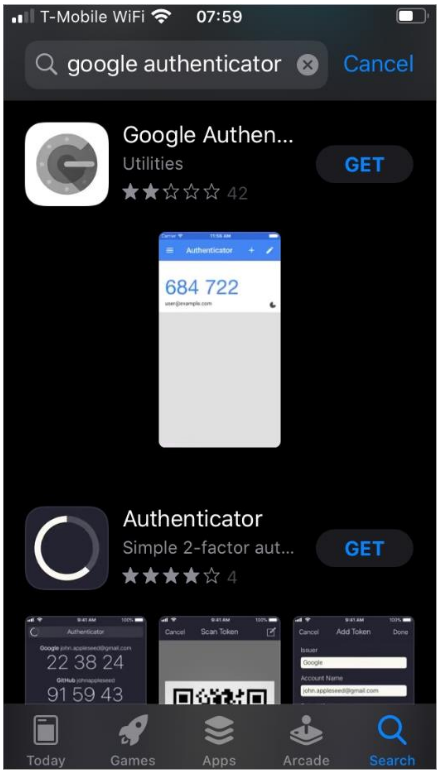
Logging in to XTM when 2-step verification is enabled – two views (on the left: with no browser cookies enabled; on the right: with browser cookies enabled)

Should you need help installing your authenticator app on your mobile device or web browser, follow the procedures below.

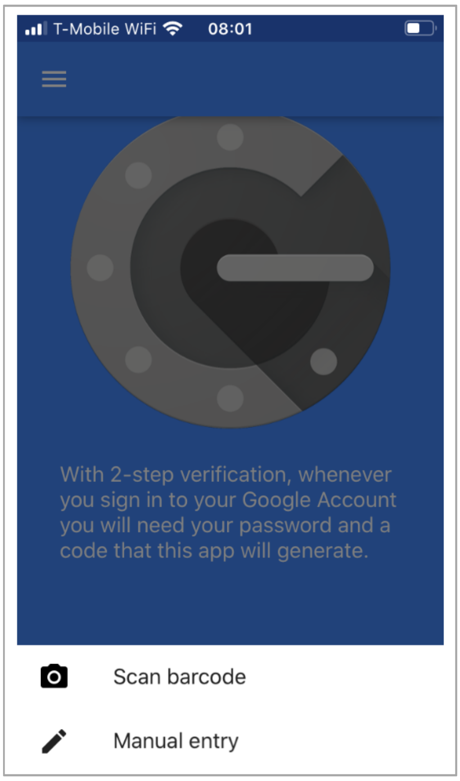
Installing an authenticator app on your iOS or Android mobile device

To set up an authenticator app:

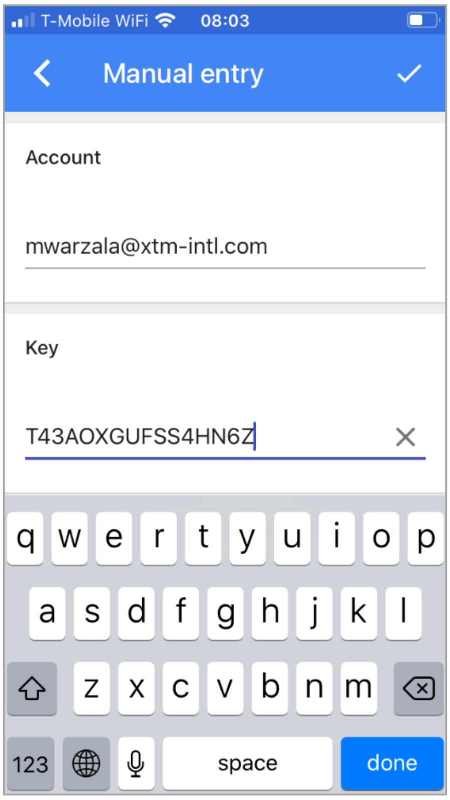
1. Download the app from the store.
2. Click the plus sign at the top of the screen and choose how you want to provide your unique code from XTM: Scan barcode or Manual entry.
3. If you have selected “Scan barcode”, use the 16-character QR code provided on the “2-Step Verification” XTM screen to complete the app setup process (the barcode method is recommended if you are using a computer). If you have selected “Manual entry”, enter the 16-character QR code into the Key field.
4. Your app will generate a 6-digit code. Enter the code on your XTM login page (“verification code” field) and click Submit.



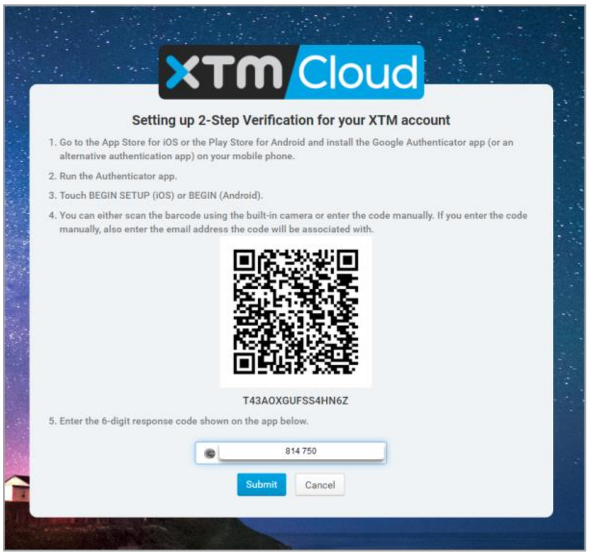
Google authenticator app in the store



Methods of verifying connection with your XTM account



Entering account and key manually

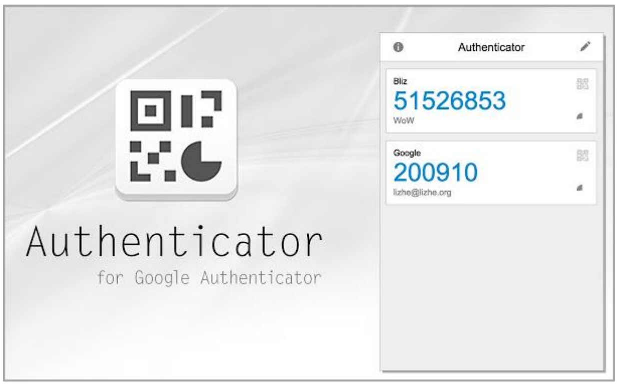


Verification code

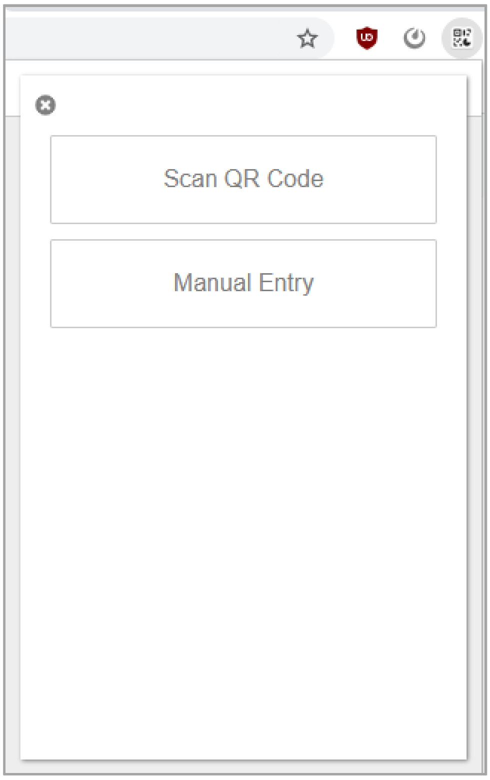
Installing an authenticator app in your browser

To install an authenticator app:

1. On Chrome, go to https://chrome.google.com/webstore/detail/authenticator/bhghoamapcdpbohphigoooaddinpkbai/related? and install the app on your browser.
2. Go to the app icon in the top right corner of your browser, click the Edit pencil icon.
3. Select the plus sign and choose Scan QR Code or Manual Entry.
4. In Manual Entry provide the issuer (the name under which you want your code to be visible to you) and the 16-character secret (i.e. the code generated by XTM on the login page. Do not change the settings under "Advanced".
5. Click OK to save the changes.



Authenticator app – Chrome web store view

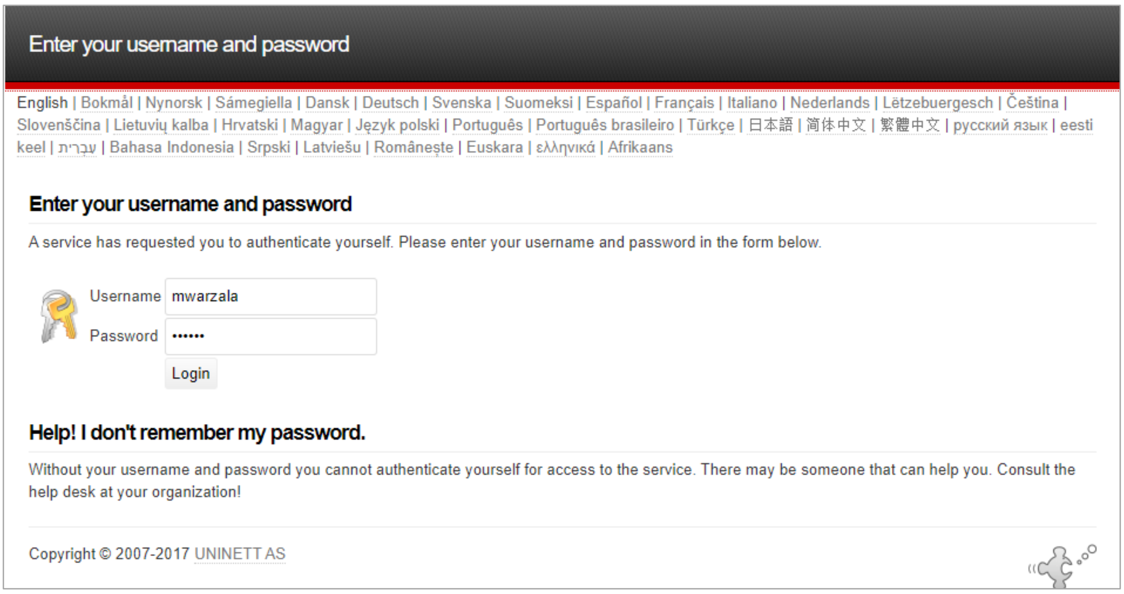


Methods of verifying connection with your XTM account

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

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

SSO can be set up with a number of different providers using OAuth 2.0, e.g. Google or Facebook, or SAML 2.0, e.g. Google or Ping Identity. The feature cannot be enabled in the user interface. To activate it, please contact our Support Team at support@xtm.cloud.



SAML 2.0 authentication

Users logging in via SSO for the first time who do not have any user role assigned to them, will have a role created automatically for them. It will be either a linguist or a PM with limited rights. The system administrator will will receive an email notifying them that a new user has been created.

Settings - Translation

ID based matching

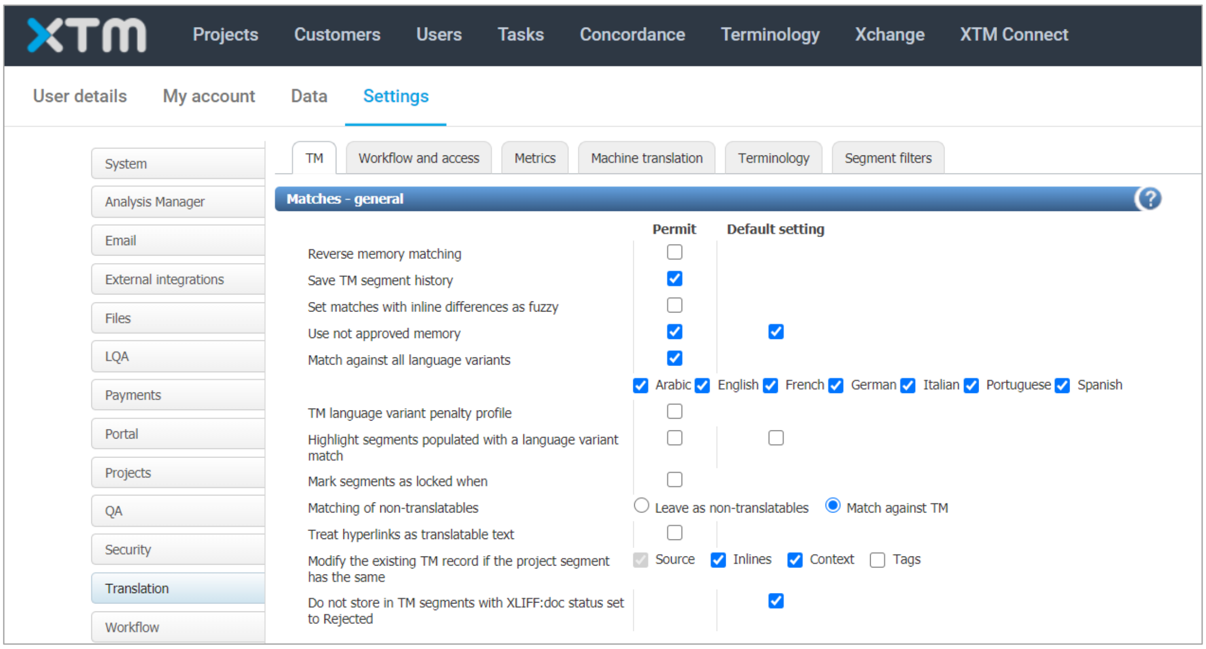
If your source files are JSON, YML, XML, YAML, properties files or Microsoft Excel and iterations of the same file are processed, then XTM can be configured to use ID based matching. This type of matching is particularly useful for translating software interface text or games, where context is not particularly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

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

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

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

Translation – TM



Configuration – Settings – Translation – TM tab

Matches – general options

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

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

The process of reverse matching is:

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

Reverse matching will give you ICE, leverage and fuzzy matches. However, note that the context of the match which is used for ICE matches is only saved in the TM at the end of the workflow. So, you will only get ICE matches from previous projects if they have finished.

Currently reverse matching is enabled or disabled for the whole system and so either used or not used on all projects.

Save TM segment history – If checked XTM will save all versions of the TM segment. The history is visible in the TM manager by clicking on the info icon next to the segment and then the clock icon in the popup.

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

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

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

TM language variant penalty profile – You can specify which penalty profile to use for language variant matches.
Note: language penalty profile supersedes any other TM penalty profile chosen at project level!

The option will only work when the following conditions are met:

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

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

Segment highlight when populated with a language variant match

Mark segments as locked when – You can choose one of the options below to lock specific types of segments:

- Match type is approved or not approved ICE and Leveraged. Segments populated with either approved or not approved In-Context Exact matches and Leveraged matches will be locked.
- Match type is approved ICE and Leveraged. Only segments populated with approved In-Context Exact matches and Leveraged matches will be locked.
- XLIFF:doc status >= Translated. Segments with Translated, Proofed and Validated XLIFF:doc statuses will be locked.
- XLIFF:doc status >= Proofed. Segments with Proofed and Validated XLIFF:doc statuses will be locked.
- XLIFF:doc status = Validated. Only segments with the Validated segment status will be locked.

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

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

Treat hyperlinks as translatable text – this can be configured on the global level only.
Check the box under the Permit column if you want to make sure that all hyperlinks are treated as translatable segments. This means that they will be included in the word count and behave like translatable segments. Moreover, external matching (from Translation Memory) and internal matching (Repetitions) will work for them in a standard way. The option, once turned on, will apply to all of the projects created afterwards. So, in the case of projects created when this option was enabled – if the user decides to turn it off – such projects must be re-analyzed.

Modify the existing TM record if the project segment has the same: when a segment has a 100% leveraged or ICE match, the new TM entry will be created if such match is edited. You can change this default behaviour and decide when an existing TM record is modified. If the source segments in the TM and your project segments are the same, existing TM records can be modified when:

- inline tags are the same
- context of segments is the same
- TM tags of segments are the same

Do not store in TM segments with XLIFF: doc status set to Reject – with this function, when segments with "Rejected" status are uploaded to TM, they will not be saved in TM. If the same segments already exist in TM, but their status is different than Rejected, they will be removed from TM.
The option is, by default, switched on for all existing and new customer accounts, but is configurable on the global and customer level.

Before you start: this option appears only when TIPP is enabled at the system level under Configuration > Settings > System (see here).

How does XTM handle duplicate entries in the TM?

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

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

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

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

Example 1

Our source file is:
First sentence.
Second {1}sentence{1}. (sentence is bold)
Third sentence.

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

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

Example 2

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

Assume our source file is now:
Second {1}sentence{1}.
Third sentence.
So, we removed the first sentence and created a third project using this file.

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

Example 3

Even with greater care should be taken when the inline restriction is lifted.
If we make a fourth project where the second sentence is no longer bold
Second sentence. (without bold style)

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

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

Example 4
First project has the tags TM_Status: Working.
Second project has the tags TM_Status: Working.
Those are obviously duplicates.

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

Those are duplicates as well.

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

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

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

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

Exact tags option

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

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

Mark segments as locked when: Allows you to lock the segment in XTM Workbench depending on the match type, the match approval status and the XLIFF:doc status. There are 2 standard options to select:

1. When the match type is approved or not approved ICE and leveraged
2. Match type is approved ICE and leveraged

There are 3 additional options if TIPP is switched on under Configuration > Settings > System

- XLIFF:doc status is >= Translated
- XLIFF:doc status is >= Proofed
- XLIFF:doc status is = Validated

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

ICE match options

Populate target with match allows you to determine when the ICE match is automatically inserted. There are three options:

1. Always even if inline tags are different
2. Only if inline tags are the same
3. Never

Number of matches to display: Enter the number of matches to display in the box.
Allow editing of ICE matched segments: An In Context Exact (ICE) match should not need to be reviewed or edited, however if this is not the case this option may be switched on here.
Set ICE matches from not approved TM to done

Allows you to set for which steps in the workflow, the status of segments with this kind of match, should be automatically set to done.

Leveraged match options

Search only if there are no ICE matches: By default, if there is an ICE XTM does not look for a leveraged match. You can change this behaviour by checking the box.
Show leveraged matches: there are five options that determine if the match is shown to the translator:

Yes
Only if its approval status is higher that the ice of leveraged match
Only if its XLIFF:doc status is higher than the ICE or leveraged match
Only if its XTM and XLIFF:doc status is higher than the ICE or leveraged match
No

Populate target with match: there are three options that determine if the leveraged match is automatically entered into the target:

Always even if inlines are different
Only if inline tags are the same
Never

Number of matches to display: Enter the number of matches to display in the box.
Save context of leveraged matches in TM when automatically set to done: If you check this option, when a 100% leveraged match is automatically set to done, it will be saved with context information. The result of this is that in future projects, you should get an increased percentage of ICE matches.
Set leveraged matches from approved TM to done: This option allows you to set for which steps in the workflow, the status of segments with this kind of match, should be automatically set to done. It is important to note that 100% leveraged matches with inline differences are not marked as done and remain orange. Set leveraged matches from not approved TM to done: As above but this relates to TM that has not been approved yet.

Fuzzy match options

Search for fuzzy matches even if specific matches found: By default, if there is an ICE or leveraged match XTM does not look for a fuzzy match. You can change this behaviour by checking the boxes – ICE or Leveraged in this option.
Show: for each level of fuzzy match there are five options that determine if the match is shown to the translator:

Yes
Only if its approval status is higher than the ICE or leveraged match
Only if its XLIFF:doc status is higher than the ICE or leveraged match
Only if its XTM and XLIFF:doc status is higher than the ICE or leveraged match
No

Populate target with: for each level of fuzzy match there are three options that determine if the fuzzy match is automatically entered into the target:

Always, fixing inline differences
Only if inlines tags are the same
Never

Number of matches to display: Enter the number of matches to display in the box.

If segment has one number, which is different, promote fuzzy match to leveraged & substitute number: If the only difference between the segment and the TM is a number then XTM can be set to insert the correct number upgrade the match to leveraged.

Repeats

Allow hiding repeated segments: When this option is enabled, an option called Hide repeated segments is available during project creation. The option can be used to only translate the segment that contains the first occurrence, while the repeated segments are processed in the background. The feature is activated when the percentage of repetitions in a file exceeds the value set during project creation.
The feature includes cross-file repetitions. Repeated segments are automatically hidden in XTM Workbench and then silently propagated to all subsequent repetitions.

Fuzzy repeat options

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

Configuring segment status

In this sectioon Administrators and Project Managers set the required bevaior for the segment statuses in XTM Workbench.

Accessing Segment status

1) Select the configuration icon ⚙ > Settings > Translation > TM > Segment status.

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

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

Set non-translatables as done:
This section firstly allows you to determine whether this option appears in the interface and what the default value should be. If non-translatables are set as done, then these segments will be automatically set to green and will not require attention from the linguist. You then have three options:

1. Set all steps to done
2. The first step only: Choose if a reviewer or corrector should check all segments
3. All steps except the last step: Choose if a reviewer or corrector should check all segments

Show the last user details in TM after a segment update
If changes to segment status and/or target are applied during an automatic step in the workflow the Modified by metadata in the TM record shows: by default: SYSTEM.
If you check this option: the details of the user who applied the latest changes to status and/or target in XTM Workbench before an automatic workflow step. If no user applied changes during the project and only the automatic step introduces changes, XTM Cloud will log "SYSTEM" as "Modify by".

Translation – Workflow and access

Accesing Workflow and access tab

1. Select the configuration icon > Settings > Translation > Workflow and access.

Linguist metadata access

You can specify whether linguists or LSPs can access project description, reference ID or custom fields. You can also apply "All" custom fields value for linguists or LSPs in the multiselect dropdown so that when new custom fields are added or updated the project custom fields configuration does not need to be changed each time.

Linguist general options

Allow linguists to download - This option can be used to allow or prevent users from downloading tasks, working offline and then uploading the completed file. This includes Source, Target, PDF, HTML, TMX, TIPP, XLIFF, XLIFF – no target populated, XTM Excel Editor, Excel extended table, Excel multilingual, Alternative translation, PDF review and Unclean doc.

Allow linguists to upload - Target, TIPP, XLIFF, Excel, PDF review

Allow setup of File upload/download options by project managers – this option is deactivated by default; if you turn it on, you will let project managers change linguist's permission to download and upload files using Project and Customer configuration.

Show statistics of finished tasks to linguists - when activated, linguists can access a summary of statistics from the tasks they have completed.

Allow linguists to use Microsoft Word spelling checker – lets linguists use MS spell checker

Allow linguists to use Xbench - lets linguists use Xbench

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

- All available tasks in this language
- Only the selected task
- All available tasks in the selected step
- All available tasks in the project
- Only the selected task in all steps in this language
- All available tasks in the selected step in this language
- Show all options when performing the action

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

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

Prefer XTM Workbench in XTM Visual mode (if available) – if you set preference of XTM Visual mode over the standard mode, the "Open in Visual mode" option is set to default when opening projects in XTM Workbench
Pre-processing: show original source in a column

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

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

TMX download options: There are 5 options:

1. Translated segments plus all matches from entire file
2. Translated segments assigned from entire file
3. Translated segments plus all matches assigned to the user
4. Translated segments assigned to the user
5. Translated segments modified by the user only

Linguist workflow options

Reassign updated task to the original user group – with this option, when updating files under the continuous project function, you can reassign the project to the original group of linguists instead of the linguist who worked on the project.

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

1. Do not allow
2. Finish only
3. Finish or reject manually
4. Finish or reject automatically depending on segment status

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

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

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

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

Message when XTM finds an inconsistency – If you enter a message in this box. a linguist will get information about what kind of errors and inconsistencies there are. You can leave the box empty if you prefer.

Text formatting

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

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

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

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

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

XTM Workbench customization

Enable XTM Workbench customization – use this option to allow users to tailor the view and functionalities of XTM Workbench, such as docked panels or previews, to their needs. With this option activated, the Customized view tab is available in XTM Workbench.

Allow user to customize XTM Workbench – with the Enable XTM Workbench customization option turned on, PMs and Admins can decide which users can customize XTM Workbench to suit their needs. Users who are allowed to customize XTM Workbench, have access only to the options enabled in the Simplified Mode at the system level (if any restriction is defined).

Define Simplified Mode – this function lets PMs or Admins decide which XTM Workbench features are displayed to specific users. To configure this option – at the user level, go to User >Edit > Access rights > Open XTM Workbench in Simplified Mode.

Hiding the Concordance panel from view will turn off all Concordance-related functionalities such as setting shortcuts, concordance statues in the status column, and availability of the feature in the context menu.

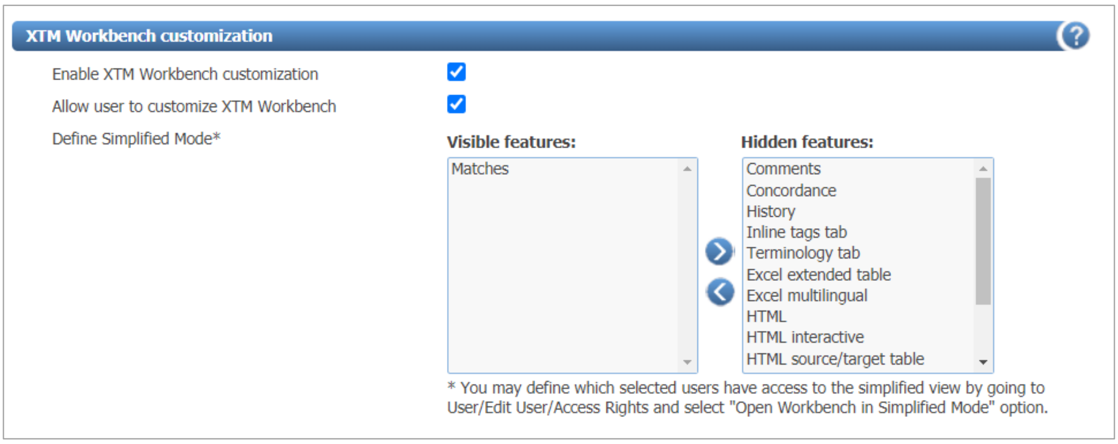
Hiding the History panel from view will turn off all History-related functionalities such as accessing the segment history information from the docked panel and from the context menu.

Hiding the Matches panel from view will turn off all Matches-related functionalities such as: setting shortcuts, match statues in the status column (incl. MTs), segment filters (except for Repeated segments) and availability of the feature in the context menu. Also, decoration of the matches in XTM Visual mode preview will be unavailable.

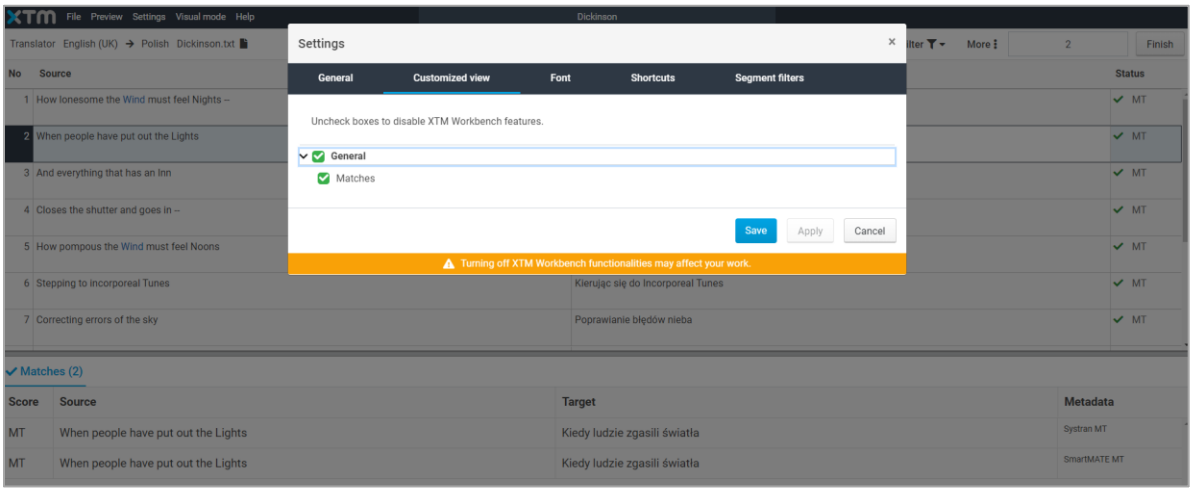
Hiding Comments panel from view will turn off all Comments-related functionalities such as entering comments, setting shortcuts, markings in the status column, segment filters and availability of the feature in the context menu.

Hiding Inline tags panel from view will not affect Inline tags-related functionalities. Inline tag validation (QA option) is not affected by this setting and will continue running according to the QA profile specified at project level.

Hiding Terminology panel from view will not affect Terminology-related functionalities.



Simplified Mode with Matches panel set to visible – Settings view



Simplified Mode with Matches panel set to visible – XTM Workbench view

Inline tags

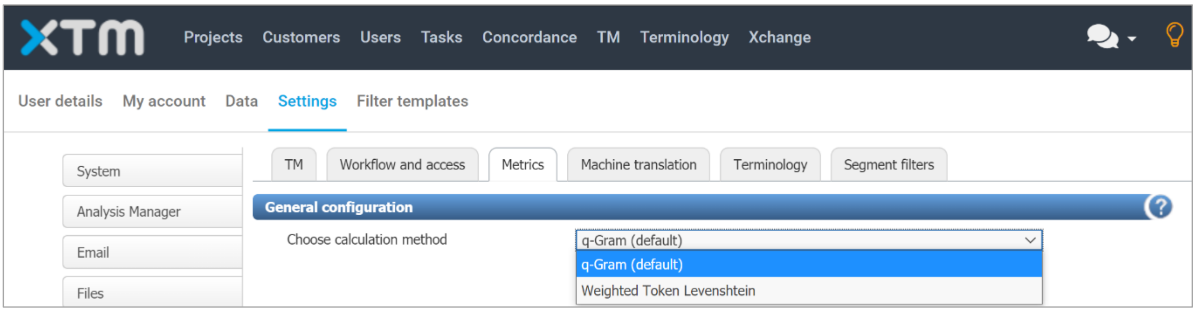
Allow Auto-insert inline tags – when selected, inline tags used in a source segment are automatically inserted into the corresponding target segment; by default the feature is enabled (see: here).

Translation – Metrics

General configuration

The default fuzzy metric calculation is based on the q-Gram algorithm.
You can change the metric calculation for an optimized TM leverage to the Weighted Token Levenshtein algorithm.

- Select Weighted Token Levenshtein from Configuration > Settings > Translation > Metrics tab > General configuration > Choose calculation method.
- Click Save.



Configuration > Settings > Translation > Metrics tab > General configuration

Metrics calculation for character-based languages

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

By default, the values are:

Chinese (Hong Kong)	2.8
Chinese (Simplified)	2.8
Chinese (Traditional)	2.8
Japanese	3
Korean	3.3
Thai	6

You can change these factors if required.

Translation - Machine translation

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

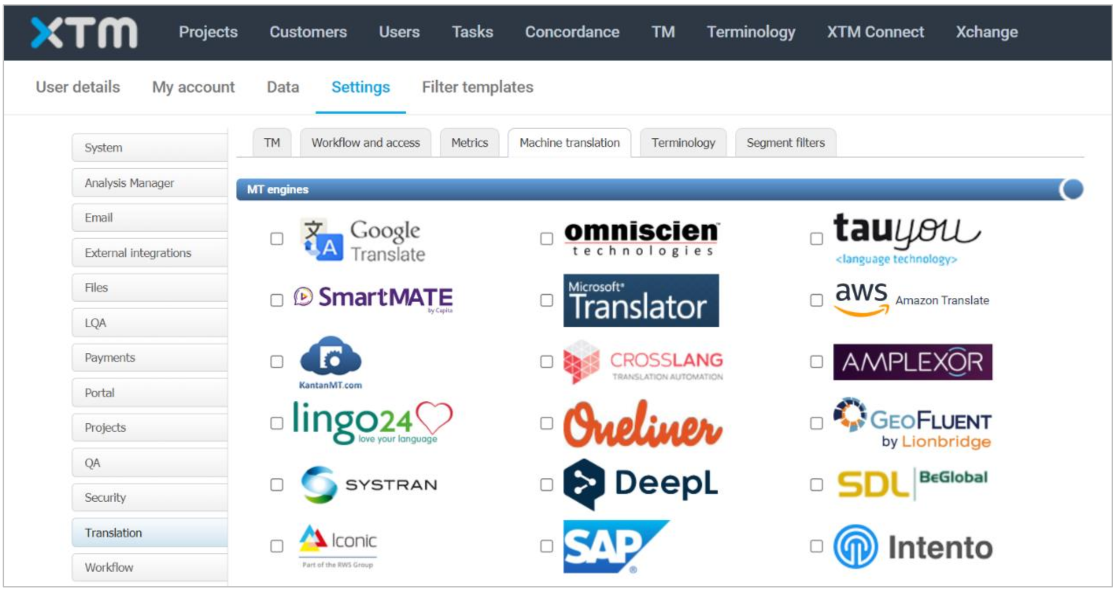
Check the MT engine that you plan to use and then enter the details in the fields that appear. See below for a description of each engine.

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

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

Once you have selected your MT engine, decide how you want to have your text analyzed:

1. In XTM Workbench – the text is sent to a MT only when a user enters a segment in XTM Workbench in the Edit mode. The translation is provided on a segment-to-segment basis.
2. After analysis – the whole text is sent to MT matching during project analysis. When the user enters XTM Workbench, all segments are filled out with MT matches
3. After analysis and in XTM Workbench – the whole text is sent to MT matching during project analysis. The text can be resent to the MT on a segment-to-segment basis as in “In XTM Workbench”.



Configuration – Settings – Translation – Machine translation tab

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

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

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

Check Google Developers Console to generate API key.

Check Google Cloud Translation pricing page for info on pricing.

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

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

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

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

SmartMATE

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

Microsoft Translator

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

There are 3 ways to access Microsoft Translator:

1) XTM shared account
In this option, Microsoft Translator is free-of-charge. The account is not private, so no Client IDs or Client Secrets are required.

2) Azure Marketplace
If you do not use the XTM shared account, you need to get your token to access Microsoft Translator API. Learn more here: https://docs.microsoft.com/en-us/azure/cognitive-services/translator/translator-text-how-to-signup.

3) Microsoft Custom Translator
Custom Translator creates a private memory for a specific key. You can train this memory with domain-specific TMs. To find out more about this solution and sign up, go to: https://portal.customtranslator.azure.ai/ .

Amazon Translate

The machine translation engine details are available here: https://aws.amazon.com/translate/. Amazon Translate is a neural machine translation service that delivers fast, high-quality, and affordable language translation. Custom Terminology is a feature used to customize Amazon Translate output to use company- and domain-specific vocabulary. By uploading and invoking Custom Terminology with translation requests, you ensure that your unique content, such as brand names, character names, and model names, is translated exactly the way you need it.

KantanMT

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

CrossLang The machine translation engine details are available here.

Amplexor The machine translation engine details are available here.

Lingo24 The machine translation engine details are available here.

Oneliner The machine translation engine details are available here.

Lionbridge GeoFluent
The machine translation engine details are available here.

SYSTRAN Pure Neural™
The machine translation engine details are available here.

Thanks to the Neural Fuzzy Augmented powered by SYSTRAN, it is possible to improve machine translation matches using the highest fuzzy matches coming from the translation memory up to the 84% threshold.

For the Neural Fuzzy Augmented, SYSTRAN offers two types of accounts:

- **Free** translation of 1.000.000 characters per calendar month
- **Pro** unlimited translation

How to enable Neural Fuzzy Augmented

1. Go to Configuration > Settings > Translation > Machine translation > General options. Deselect the 75-84% fuzzy checkbox.
2. In the SYSTRAN MT tab, select the Enable Neural Fuzzy Augmented matches checkbox.
3. Select when to send text for matching:

- In XTM Workbench
- After analysis
- After analysis and in XTM Workbench

A fuzzy machine translation match based on an existing fuzzy translation can be accessed in the Matches panel in XTM Workbench if:

- the maximum level of fuzzy match is 84%
- there is no higher match than fuzzy in the segment (ICE, leverage, repetition)
- there is at least one fuzzy match in the 75-84% range

DeepL The machine translation engine details are available here.

SDL BeGlobal
A cloud-based machine translation solution, integrated with SDL BeGlobal API for customization.

More information about API authentication:

Iconic Translation Machines
This is a neural MT engine provider. More about Iconic MT can be found here: https://iconictranslation.com/ and here.

Intento
For configuration, contact us at support@xtm-intl.com

SAP Translation Hub
This integration is based on the SAP Document Translation service. The documentation can be accessed here.

Custom Machine Translation

XTM provides the option to enable and configure the connection to a custom MT engine.

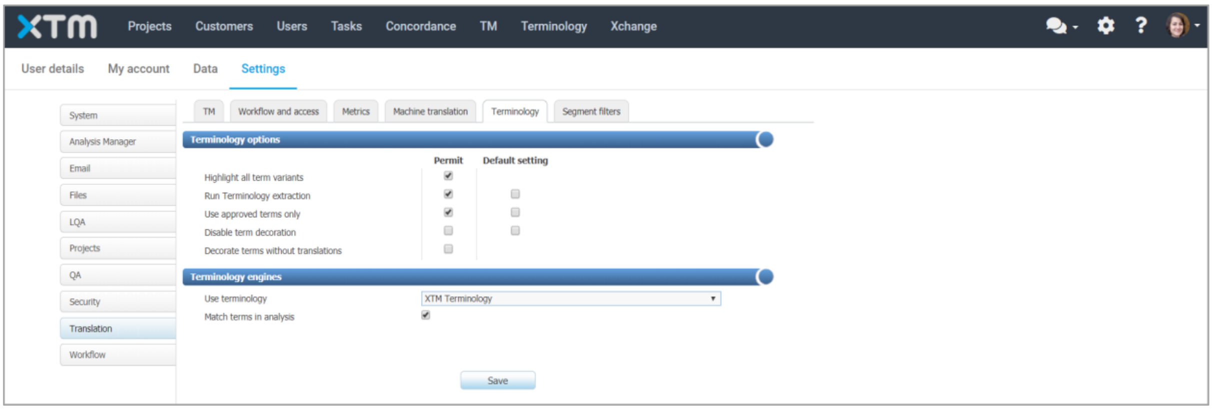
How to add custom MT

Click Add custom MT to open a configuration window.

1. Fill out the required fields:
    a) Enter a unique name for your Custom MT.
    b) Provide the username and password used to log in to MT.
    c) Enter API Base URL.
    d) Provide your endpoints for authentication and translation.
    e) Provide the Check status endpoint and time intervals at which the status has to be checked.
    f) Provide your endpoint for downloading translation.
    g) Choose custom fields (which are configurable for each MT engine – see more on project custom fields here).
    h) Optionally, provide a prefix of your custom field (to distinguish custom fields metadata sent to MT from other metadata).
2. Click Add.

The decision whether to use Custom MT is configurable:
When creating a project, in the Project Editor, and in the Project template editor.

Translation - Terminology



Configuration – Settings – Translation – Terminology tab

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

Terminology options

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

Run Terminology extraction – When checked XTM will extract a list of candidate terms as an additional step in the file analysis. The candidate terms are produced as an Excel spreadsheet which can be downloaded from the Download option of the Context menu in the Project list. Extracted terms cannot be downloaded for archived projects.

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

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

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

Terminology engines

XTM Cloud has a comprehensive built-in terminology module that is described in the XTM Terminology chapter.

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

Translation - Segment filters

The segment filters tab allows you as an administrator to set which filters and filter profiles are available to your users. By default, all filters and profiles are switched on.

How to deselect segment filters

1. Go to Configuration ⚙ > Settings > Translation > Segment filters.
2. Deselect any filter or profile that you do not wish to appear.
3. Click Save.

How to enable linguist to turn the segment profile off

As an administrator you can decide to give linguist more control over segment filter profiles.

1. In the project's General info tab, select the segment filter profile
2. Select the option Enable linguist to turn the profile off.

Linguists can now decide to turn the profile on or off as needed.

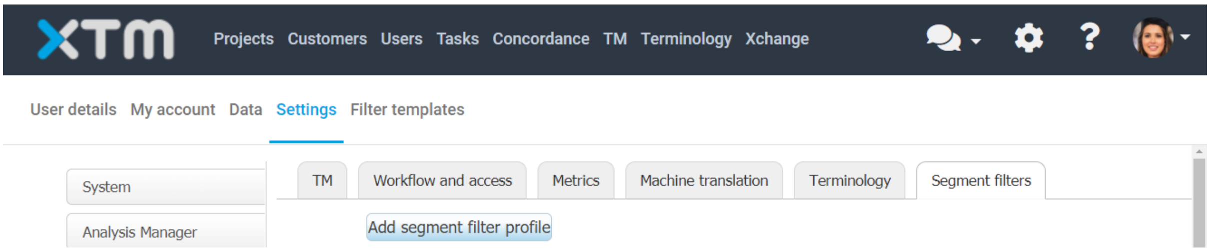
Filter profiles

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

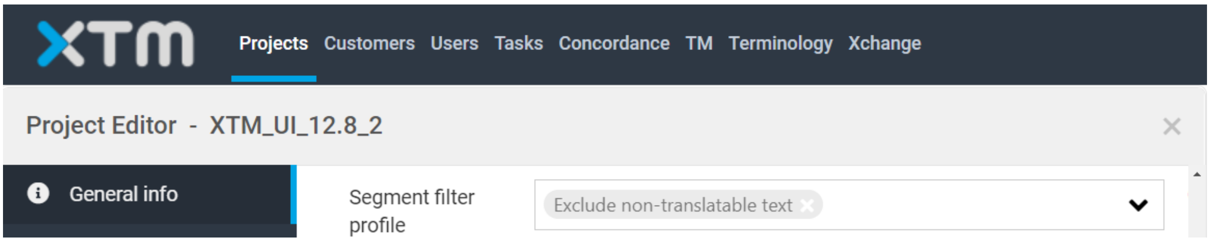
Creating segment filter profile

Administrators and Project managers can decide:
1. Which segment filters can be accessed by linguists in XTM Workbench.
2. Whether linguists can disable those filters.

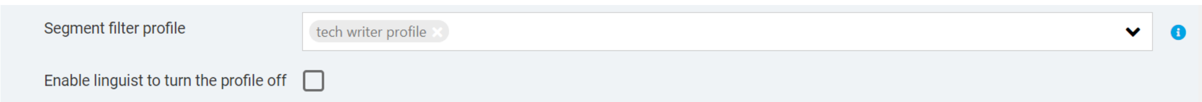
How to configure segment filter profile?
1. Go to Configuration > Settings > Translation > Segment filters > Add new segment filter profile
2. Fill in the popup as required and save.
3. Segment filter profile can now be accessed in:
    - the 'Create project' form
    - the project template form
    - the Project Editor > General info > segment filter profile dropdown
4. Once the segment filter profile has been added, an additional checkbox appears: Enable linguist to turn the profile off.



Adding segment filter profile



Choosing segment filter profile in the Project Editor



Additional Enable linguist to turn the profile off checkbox

Modifying filter profiles

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

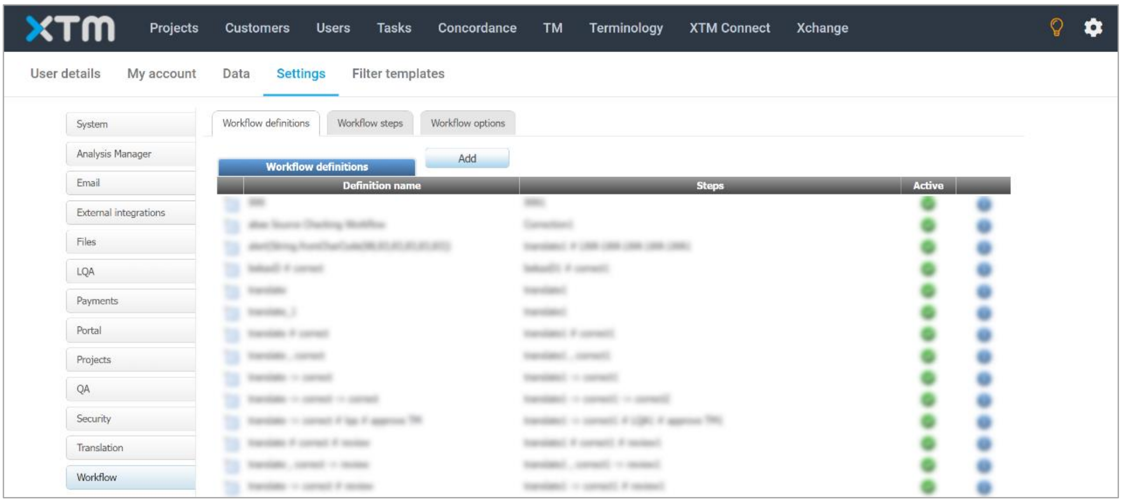
Deleting filter profiles

1. Click the icon to the left of the filter profile name.
2. Select Delete from the dropdown menu.
3. Click OK in the confirmation box to delete the filter profile.

Settings - Workflow

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

Workflow definitions



Adding new workflow definitions

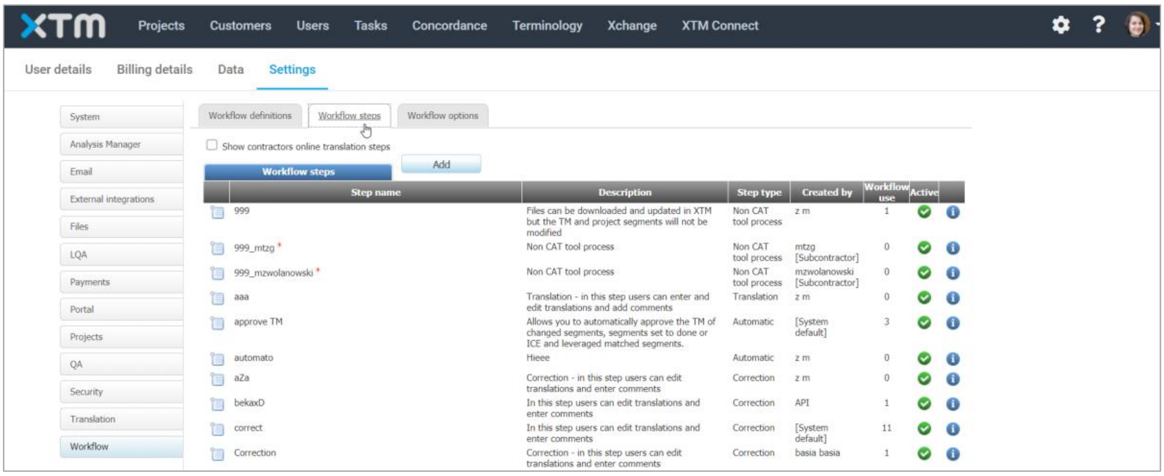
Adding new workflow definition

1. Select the configuration icon > Settings > Workflow > Workflow definitions.
2. Select the Add button.
3. In the popup, add a name for your worflow definition.
   By default, XTM will automatically generate a name for the workflow based on the steps you choose.
4. *Optionally* Add worflow description.
5. Define the first workflow step options:
   - Percentage of whole workflow duration
     how much percentage of the entire project workflow time should be automatically calculated for each of the steps
   - Approve TM
   - Calculate costs based on manual time
   - LQA
   - Notify project watchers when finished
   - Set XTM status to green/done
6. All segments must be completed to finish the task
   To add a step, select the plus icon .
7. Select the step type from the dropdown. You can define your own worflow steps.
   For more information, check Workflow steps
8. Select the transition type from the dropdown. Choose the transition type between steps. (Check Blocking mechanism between workflow steps)
9. Click Save.

Workflow steps

To access the existing workflow steps.

1. Select the configuration icon ⚙ > Settings > Workflow > Workflow steps.



Reviewing the existing workflow steps

Creating a new workflow step

1. Select the configuration icon ⚙ > Settings > Workflow > Workflow steps.
2. Select the add button. Select the step type:
   a. Standard steps
      allow you to create a new step with the same functionality as a standard step but give it a different name. Standards steps include:
      - Translate
      - Correct
      - Review
      - LQA

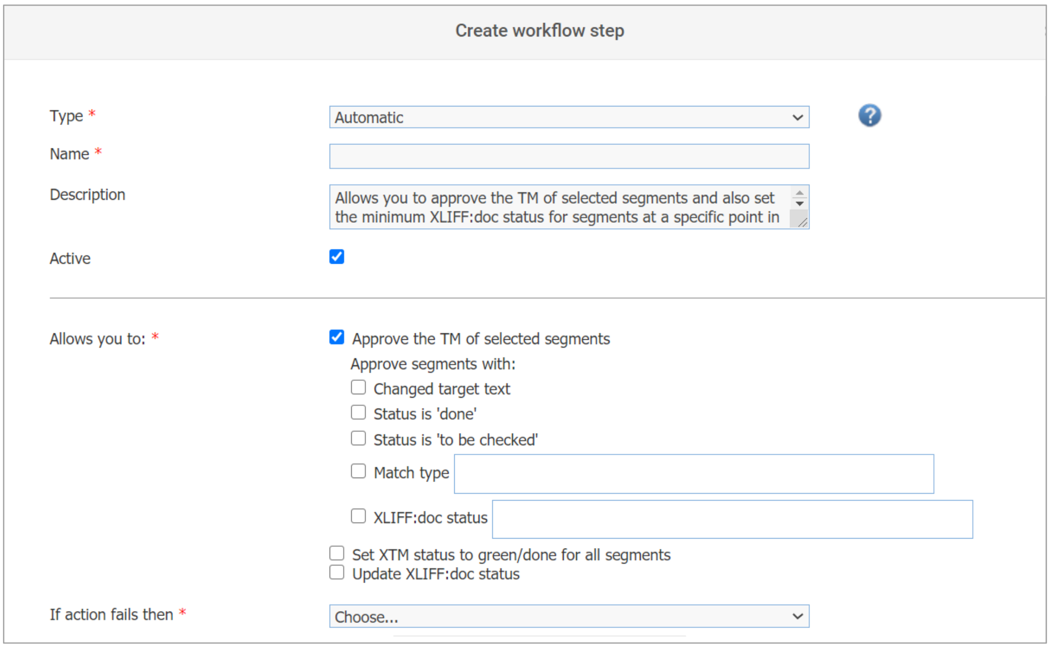
   b. additional steps Management task. An example of this would be an approval step before the translation process starts.
      - Non-CAT tool process.
        Example: DTP step after translation where some layout changes are required. Changes to the target text made in this type of step are not saved in the TM or terminology database.
      - Automatic task. Allows you to:
        a. Approve the TM of selected segments.
        b. Set the XTM Status to green/done for all segments
        c. If TIPP is activated in Configuration > Settings, then the automated step also gives you the option to update the minimum XLIFF:doc status for segments at a specific point in the workflow or update all XLIFF: doc statuses taking into account any of the three available conditions
      - Approve the TM of selected segments.
        a. Segments with changed target text
        b. Segments with a status of "done"

c. Segments status of “to be checked”

d. Segments with a match type of ICE, Leveraged or non-translatable

e. With a specific XLIFF:doc status: new, translated, proofed, or validated

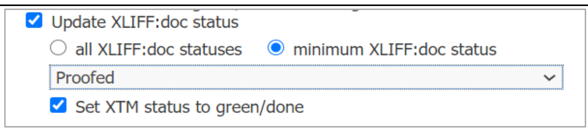
3. Set the XTM Status to green/done for all segments

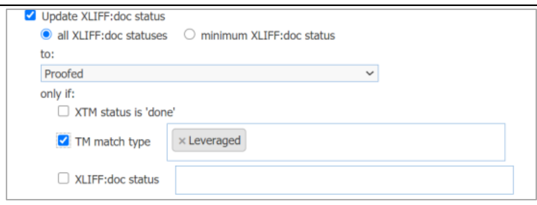


Adding a new automatic workflow step – Approving TM status

Updating XLIFF:doc status

When updating the XLIFF:doc status, first choose if you want to update all XLIFF: doc statuses or only the minimum one.

<table>
<tr><th>Update of only the minimum XLIFF:doc status</th><th>Update of all XLIFF: doc statuses</th></tr>
<tr><td>

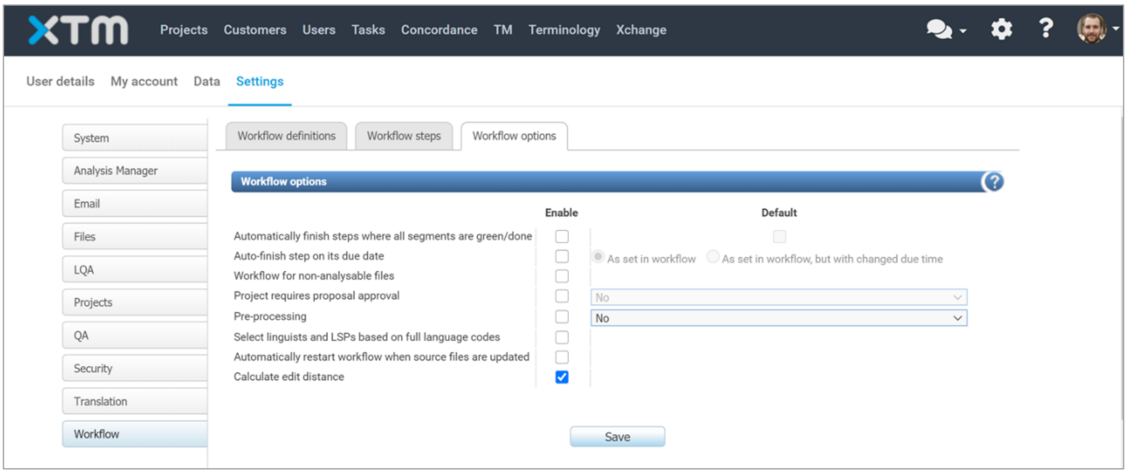
Updating all XLIFF:doc statuses</td><td>

Updating the minimum XLIFF: doc status</td></tr>
<tr><td>This way the minimum XLIFF:doc status in your project will be automatically changed to the one selected in the dropdown, while the XTM status will be changed to green/done (“Completed”)</td><td>This way all XLIFF:doc statuses will be updated to the one selected in the dropdown, only if one or any of the conditions is met:
- XTM status is done („Completed”)
- TM match type is one or more of the selectable three: ICE, Leveraged and Non-translatable
- XLIFF:doc status is one or more of the selectable three: New, Proofed, Validated</td></tr>
<tr><td colspan="2">For all of the above automatic actions, you can decide what to do if the action fails: you can either stay on the same step or move to the next step.</td></tr>
</table>

Workflow options

Accessing workflow options:

1. Select the configuration icon ⚙ > Settings > Workflow > Workflow options.



Workflow Options tab

The workflow options are:

Automatically finish steps where all segments are green/done

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

Auto-finish step on its due date

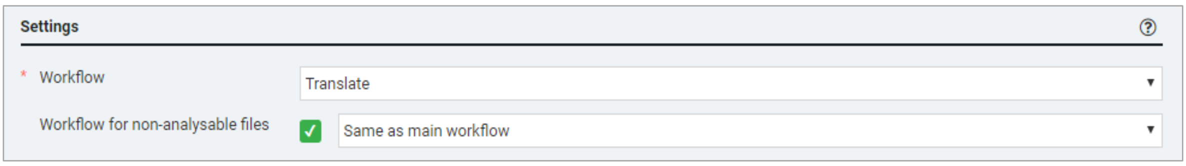
Check this box to turn on/off the functionality on other system levels. You can decide to have workflow steps finished automatically:

- on the same date and at the same time as set up in the workflow
- on the same date, but at different time than set up in the workflow.

You can also indicate a user who will be assigned to automatically finish the workflow step. The user will need to have the rights of an Administrator or a PM, while the information about the user is only stored in Project history. With this option enabled, the Auto-finish step on its due date command is added at the bottom of the Edit workflow edition window (under Configuration > Settings > Workflow > Workflow definitions > Edit workflow definition as well as under Projects > Project editor > Workflow > Workflow editor).

Workflow for non-analyzable files

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



Project creation – setting the workflow for non-analyzable files

Project requires proposal approval

project requires authorization from Customer PM if this option is enabled. You can enter the default value, which can be No, Yes and only for projects that are bigger than a specified word limit.

Pre-processing

This option allows a project manager to create a project with a pre-processing workflow. This can be useful for:

- Locking segments so they are not taken for translation.
- Editing the source text prior to analysis and translation. In this case the new source language is the same as the original source language.
- Using pivot languages. Here the source language is firstly translated into one language and then that target language become the new source for the translation into other target languages.

When pre-processing is enabled, you can select the default behavior during project creation:

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

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

Automatically restart workflow when source files are updated
with this option you don't have to manually restart workflows and tasks whenever source files in an existing project are updated or added as this step can be automated. The workflow restarts after file analysis, but only if work in the initially uploaded source files commenced. The restarted task is assigned to the user who was initially assigned to the perform the step. If the user as assigned via a user group then it is assigned to the user who accepted it.

Calculate edit distance
Check this box to activate the edit distance calculation metric. EDC is based on a metric that corresponds to the number of characters edited in a target machine translated segment divided by the total number of characters in that segment.

This calculation results in an EDC score, which ranges from 0 to 1, the score is rounded down to 1 if the score is greater than 1. A score of 1 corresponds to a segment that requires a complete edit of the machine translation output and would be reflected by the maximum amount of payment.

The EDC score is calculated using CharacTER algorithm.

To calculate the cost, enable the option in Configuration > Data > Estimates > Cost settings > Calculate cost based on edit distance. Once your discount factors are configured, you can start generating project costs based on EDC. In your MT project, when the post-editing step is finished, you can generate costs based on statistics. The project costs will then reflect the applicable discount factors.

There are two types of EDC reports you can generate:

1. **Extended Table** This report presents Edit Distance Score for each segment, for each workflow step and for each language. It can be downloaded as an HTML, PDF, or Excel file.
2. **Project cost, metrics and assignment per step**
This report gives you insights into the total project cost before and after a discount based on edit distance score was applied. You will also see the resulting cost saving percentage based on edit distance.

Generating Edit Distance Calculation reports

Enable Edit distance calculation in the Workflow options before generating the report.

1. Go to the Project Editor > Workflow.
2. Click the Edit workflow button.
3. When the Workflow Editor window opens, check the Calculate edit distance box for any workflow step with edit rights.

Filter templates

Filter templates can be used to specify a configuration for identifying translatable text in a document. The feature can be used for:

- MS Office **Excel** files, including multilingual Excel files (xlsx, xls, xlm)
- MS Office **Word** files (docx, doc, rtf)
- Custom variables, which can be configured through regular expressions

Depending on the chosen criteria, users can decide whether to localize:

- Sheet names
- Comments
- Hyperlinks
- Text in hidden sheets
- Text in hidden cells and rows
- Formulas
- Conditional formatting
- Numbers
- Text in specified columns
- Text in a specified color (multiple colors can be selected)
- Text with applied style (e.g. bold)

Filter templates include additional options under the Other section, such as:

- HTML processing
- Whitespace processing
- Including XLSX/XLSM files.

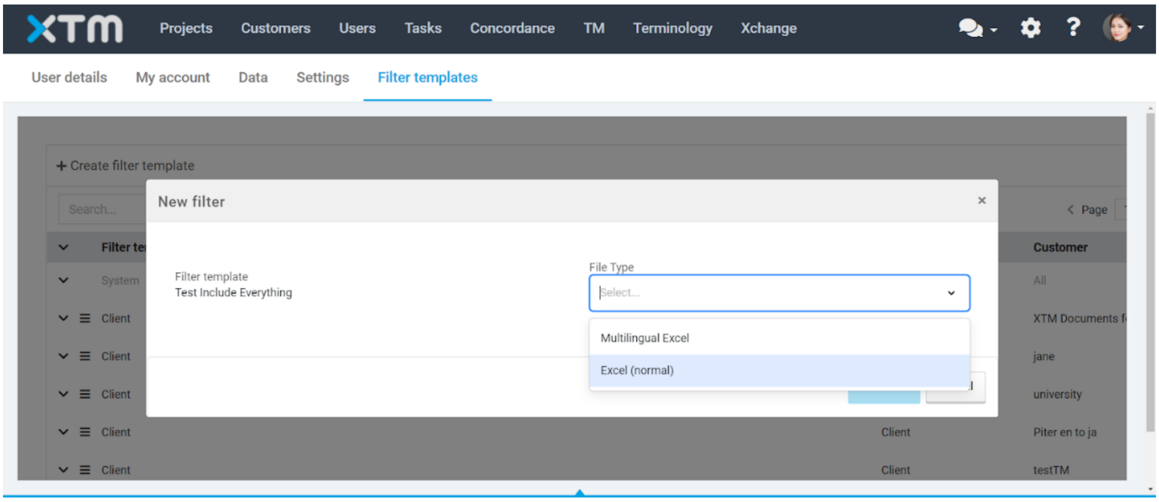
HTML tags can be shown in XTM Workbench as inline tags if HTML processing checkbox is selected. By default, whitespaces are normalized, meaning that all redundant whitespaces are removed. Users now have the option to retain whitespace if needed.

Default templates are added automatically to the projects for the selected customer.
Custom templates must be added either during project creation, or in the Project > General info tab.

How to create a new filter template in XTM Cloud

1. Select the configuration icon ⚙ and go to the Filter templates tab.
2. Select + Create filter template. The New Filter Template pop-up opens up.
3. To create a template for a **single client**: select Client from the Filter template dropdown and then the client from the Customer dropdown.
4. To create a template for **multiple customers**: select Custom in the Filter Template dropdown, add a template name and add required customers from the dropdown. Select Create and add Filter to start adding filters immediately.
5. The Create option can be used to create a placeholder for a filter template.
6. Select one of the following options from the dropdown:
    a. MS Office Word
    b. MS Office Excel
    c. Multilingual MS Office Excel
7. Select the configuration applicable to your source files.
8. Click Add filter.

The filter template can now be added to a project from the General info > Filter template dropdown. If you want to apply the new filter template to an existing project, then you need to reanalyze the project.



Creating a Filter template

Creating new filter template with custom variables in XTM Cloud

Note: This module requires some pre-existing knowledge of Regular Expressions.

The custom variable tab in the Filter templates allows you to select a specific sequence of characters using regular expressions. This fragment can be converted into an inline tag to protect it during translation. Regular expressions are extremely powerful when it comes to defining a sequence of characters, including special characters. XTM uses Java Regular Expressions.

Example
Use a regex extracting emails. During translation process in XTM Cloud, all emails from the source text are converted into inline tags.

How to create new filter template with custom variables in XTM Cloud

1. Go to the configuration icon ⚙ > Filter templates tab.
2. Select + Create filter template. The New Filter Template popup opens.
3. Select template type:
    a. **default template**: select Default from the Filter template dropdown and then the client from the Customer dropdown. The filter template will be used as default to the assigned customer and won't need to be selected during project creation for that Customer.
    b. **custom template**: select Custom in the Filter Template dropdown, add a template name and the required customer(s) from the dropdown.
4. Select Create and add Filter to start adding filters immediately.
5. Select one of the following options from the dropdown:
    a. MS Office Word
    b. MS Office Excel
    c. Multilingual MS Office Excel

- Select the configuration applicable to your source files.

6. In the Custom variables tab:
7. Add the Regular expression name
8. Add the regular expression pattern (e.g. [^@ \t\r\n]+@[^@ \t\r\n]+\.[^@ \t\r\n]+)
9. Select Add and Create filter.

Default templates automatically convert the character sequence matched by the regex and don't need to be selected during project creation or at Customer level.
Custom templates must be added either during project creation, or in the Project > General info tab.

Note: The Create option can be used to create a placeholder for a filter template.

XTM and LDAP

Overview

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

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

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

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

XTM LDAP Configuration

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

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

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

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

Adding users

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

To add users to your system,

1. Select the Users tab and then from the user listing click the Add user button.
2. Enter the general information about the user.
   Obligatory information is marked with a red star *.
3. The role field allows you to determine the type of user. Select the roles that you want this user to perform.
4. When you click save you will be taken to other tabs to complete the setup.

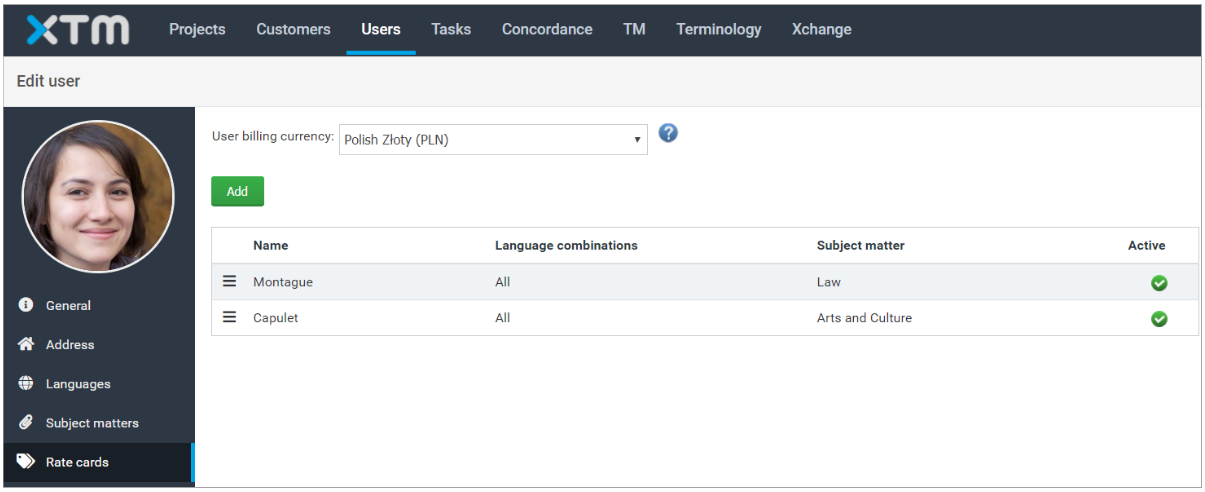
Depending on the roles that you selected, further tabs appear on the left-hand side. These options are described below.

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

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

Subject matters: Select the subject matter in which the user has expertise.

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



Adding a new user – Rate cards

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

1. Define its name.
2. Provide a brief description.
3. Decide whether the rate card is active or not.
4. Specify one or more language combinations – either single languages or groups.
5. Choose one or more subject matter.
6. Define how the cost of the task will be calculated. It can either be based on factors or actual prices. You can also set whether the calculation should be by word or character.

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

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

For both types of calculation, you can also define:

- The number of words per day
- A minimum charge per project
- A minimum charge per language (This value will be calculated and summed up for every language combination in the project from a specific Rate card for this language combination)

Under the General fixed price heading you can set:

- A fixed price per project
- A fixed price per language
- A fixed price per file
- A management fee percentage
- Minimum management fee
- Halved management fee

The Minimum management fee is set in a currency and only one value per rate card can be provided. The amount is added to the final costs if the Management fee is lower than the Minimum management fee.

Example:

1. Rate card has the following values:
    - Management fee = 10%
    - Minimum management fee = USD100

Costs calculated based on Metrics = USD 500

Given that 10% of USD 500 = USD50, the Management fee will not be applied, but the Minimum management fee.
In that case, the total cost will amount to: USD500 + USD100 = USD600

- Rate card has the following values:
    - Management fee = 10%
    - Minimum management fee = USD100

Costs calculated based on Metrics = USD1500

Given that 10% of USD1500 = USD150 the Management fee will be applied.
In that case, the total cost will amount to: USD1500 + USD150 = USD1650

The Halved management fee changes the final cost if 50% of the total cost, including the fee for management, is lower than the Management fee. It changes the final cost reducing the fee for management by half.

Example:

1. Rate card has the following values:

- Management fee = 10%
- Minimum management fee = USD65

Costs calculated based on Metrics = USD60

Given that 10% of USD60 is USD6 and it's less than USD65, a fee for management to be applied amounts to USD65.

Given that USD65 is more than 50% of USD125 (USD60 + USD65), the Halved management fee applies (USD65:2 = USD32.5)
Total cost: USD60 + USD32.5 = USD92.5

2. Rate card has the following values:
   - Management fee = 10%
   - Minimum management fee = USD65

Costs calculated based on Metrics = USD 550

Given that 10% of USD550 is USD55 and it's less than USD65 a fee for management to be applied amounts to USD65.

Given that USD65 is less than 50% of USD615 (USD 550 + USD 65) the Halved management fee should not be applied.

Total cost: USD550 + USD65 = USD615

Then for each workflow step you can define:

- A fixed price for the project
- A fixed price for the language
- A fixed price for the file
- A management fee percentage
- A rush job premium
- A minimum charge
- A price per hour

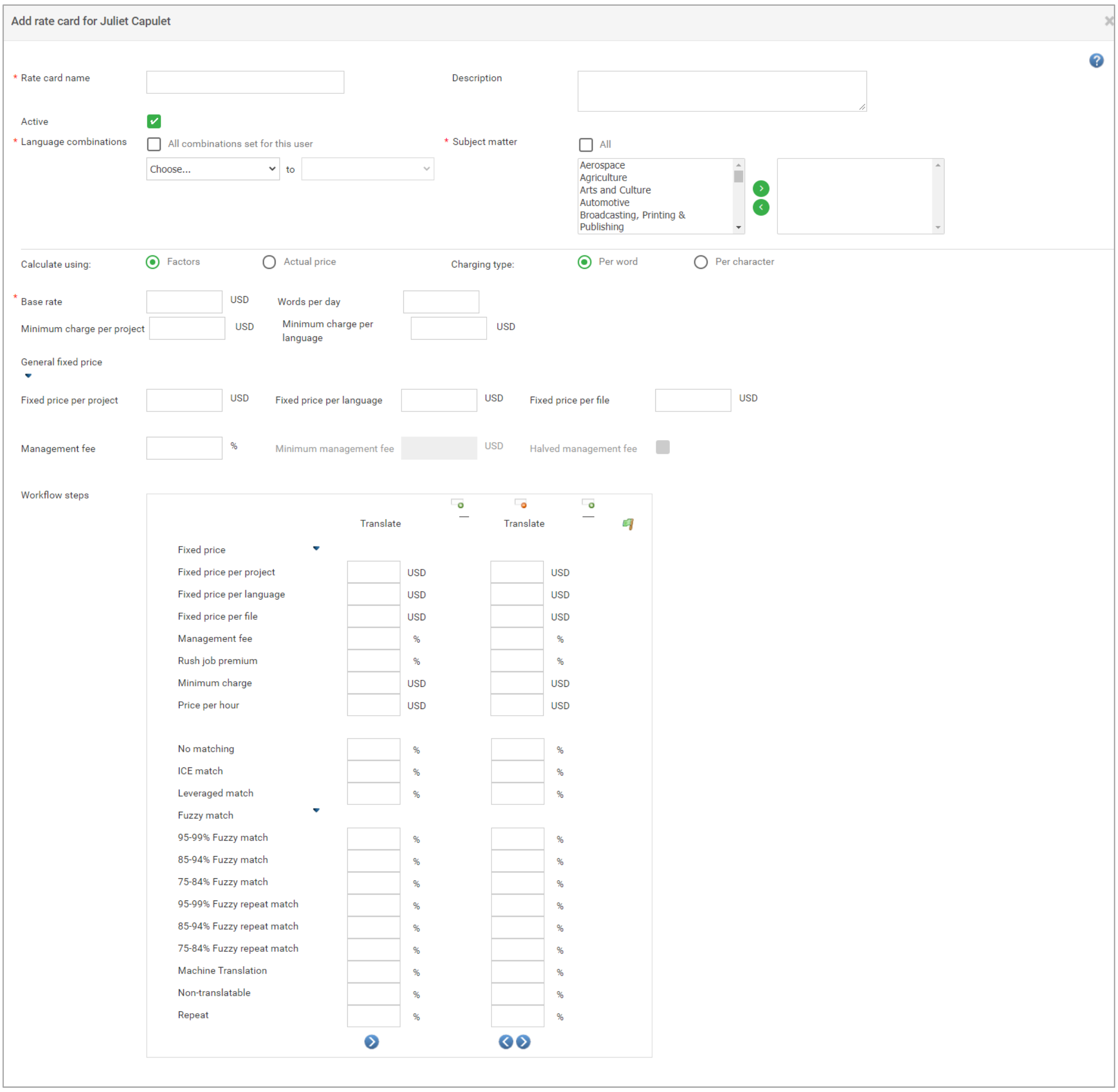
The rates for fuzzy matching factors or actual prices can be set as a global figure or individual figures for each band.

You can add or delete additional steps to the workflow:
Select the plus icon or the delete icon respectively.

Copy the values between workflow steps by using the blue arrow icons.

When you have finished entering data in the rate card click Save and close the window.

Note: Rate cards support 4 decimal points in full price entries, 5 decimal points in percentage.



Adding a new user – A rate card

Qualifications: Then enter the qualifications of the user.

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

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

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

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

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

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

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

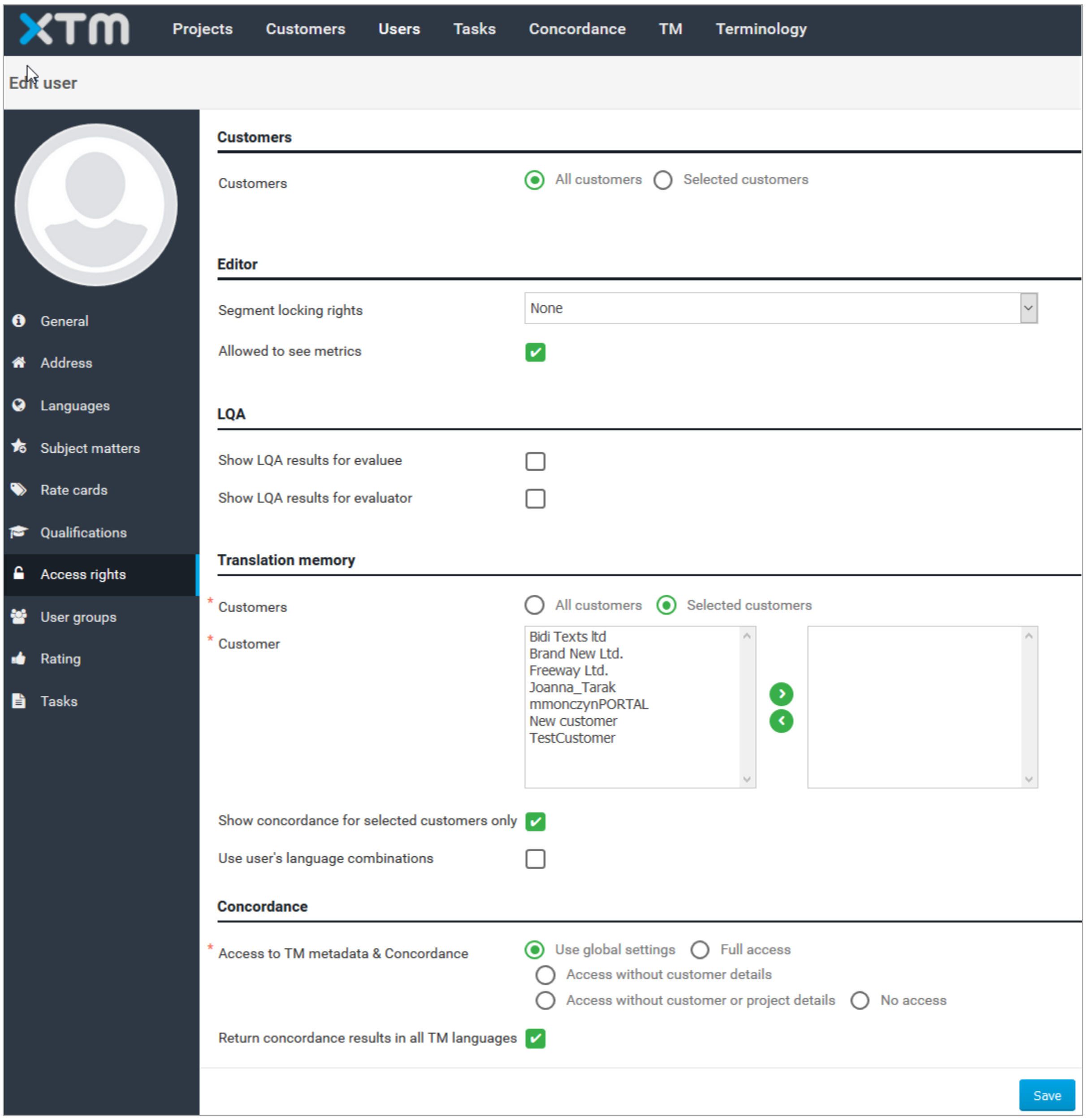
You are also able to limit the user's access to TM and Terminology to the user's language combinations by checking the available box.

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

Concordance

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

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



Adding a new user – Access rights

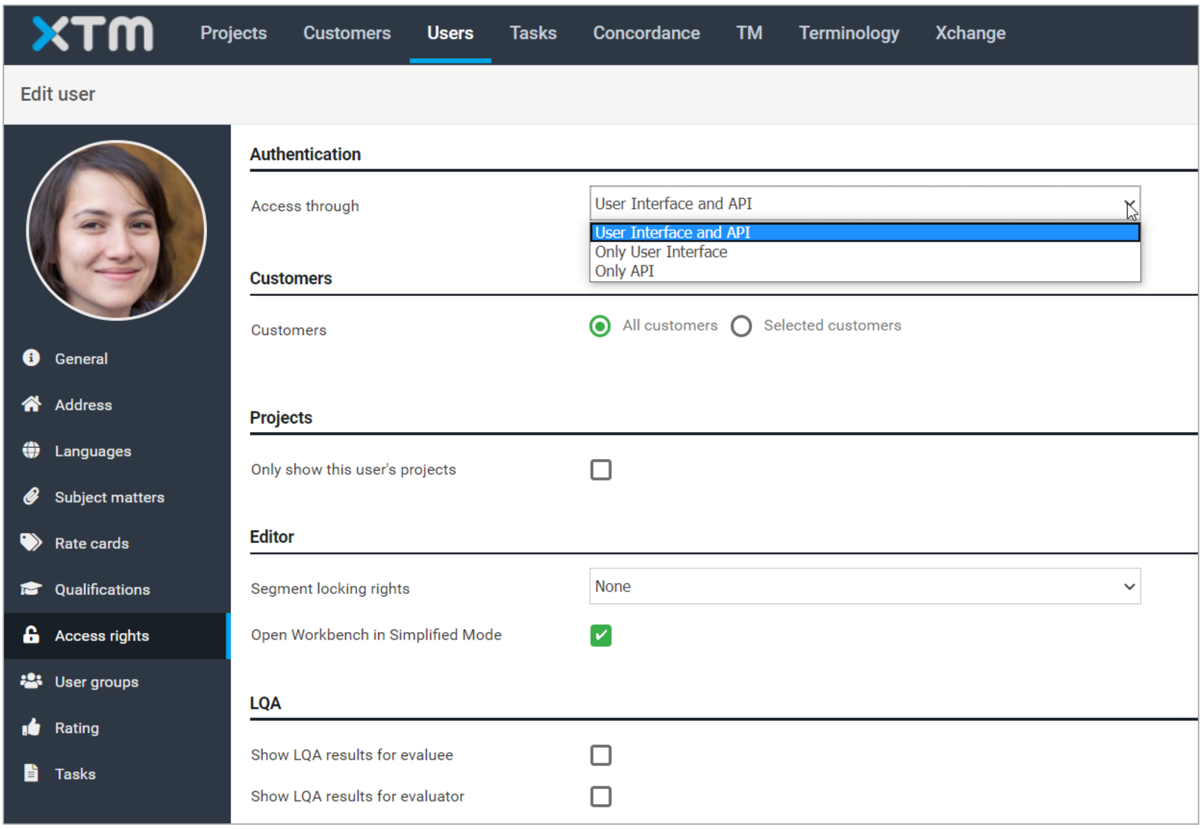
Authentication

Before you start: For the Authentication section to appear under User's Access rights, the option "Allow API authentication for new users" needs to be switched on under Configuration > Settings > Security.

For clients with access to API, the authentication procedure may be set to logging in via API, UI, or both.

There are 3 options available in the dropdown menu:

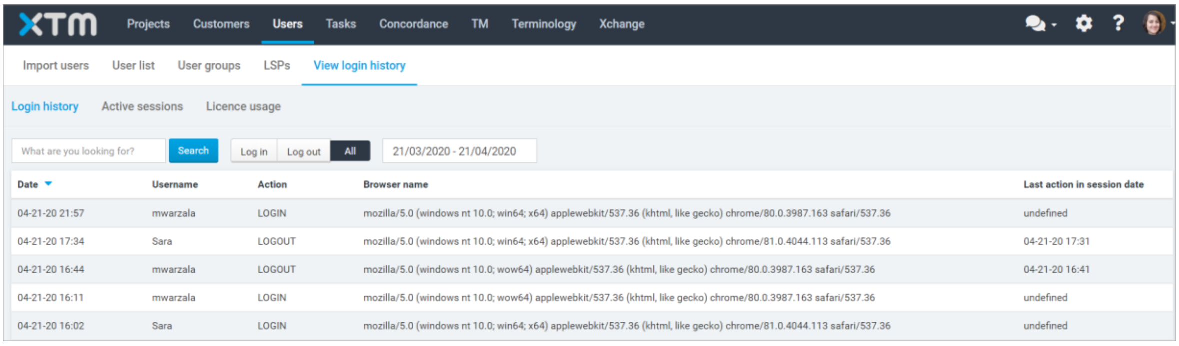
1. User Interface and API – users will be able to log in to XTM via user interface and API
2. Only User Interface – users will be able to log in to XTM via user interface only
3. Only API – users will not be able to log in to XTM via user interface, but via API (SOAP or REST). If the "Only API" user tries to log in via UI, an error message will appear.



Authentication options

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

View login History

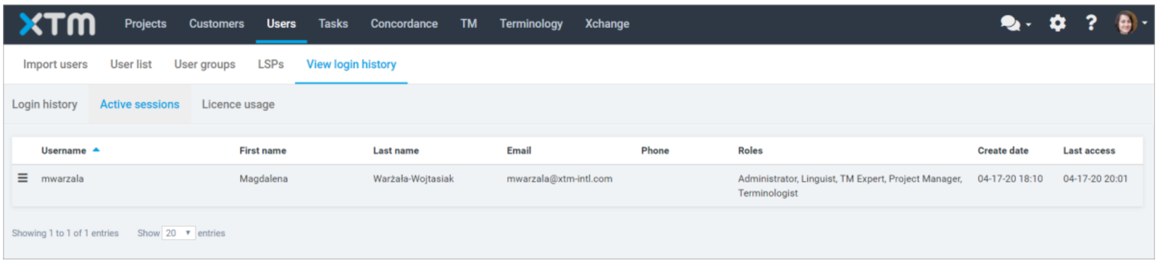


The view login history screen

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

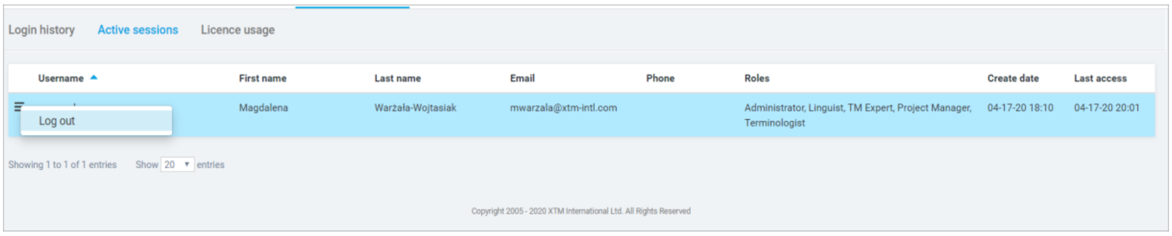
Active sessions

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



The list of active sessions

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



Forcing a user to log out

3. Subcontracting

Overview

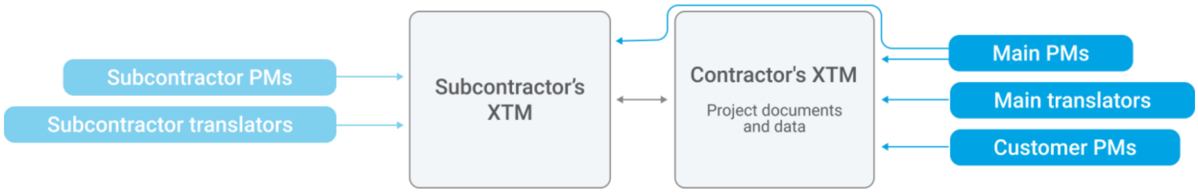
It is possible to connect your XTM system to other XTM systems and allocate tasks in your workflow to another Language Service Provider (LSP) or receive tasks from other LSPs.

Contractor company sending a project. Check Contracting a project to an LSP in XTM.

Subcontractor company receiving a project.

LSP (Language Service Provider) another name for a subcontractor - used interchangeably. LSPs: Setting up a connection with XTM contractor.

Once the connection has been set up, for details on how to manage subcontracted projects check Managing subcontracted projects in XTM.



XTM subcontracting schematic diagram

Contracting a project to an LSP in XTM

Steps a contractor needs to go through to connect with an LSP:

1. Turn on subcontracting.
2. Add LSPs user.
3. Establish a connection with LSP.
4. Check if the connection with an LSP is active.

1.Turn on Subcontracting

Set up a connection in your XTM instance to send projects to a subcontractor.

1. Go to Configuration > Settings tab > Enable subcontracting.

2. Add an LSP

1. Go to Users > LSPs.
2. Select the Add LSP button to open a dialog window.
3. Enter the subcontractor's company name, contact name, and **email address.** *Optionally* add:

   a) an additional address

   b)more contact details

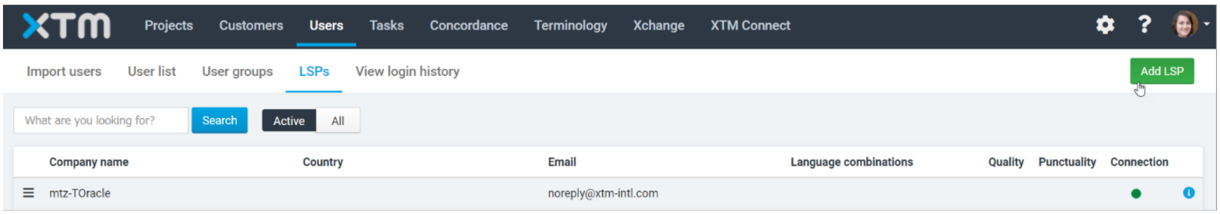
   c)choose a user to be a Dummy user for cost generation.

4. *Optionally* assign a project manager and decide which details of the Contractor PM you want to share with your subcontractors

   a) **Project Manager** – a person assigned to manage all the projects created on the LSP account. If this field is left blank, then all project managers will get emails about a given project.
   b) **Display Contractor PM details on LSP's account** – show details of the PM who manages a project on the contractor's side. If the contractor PM changes, the change will not be updated on the LSP instance.

c) **Contractor PM details** – choose which details can be revealed: Username, User ID, First and last name, Initials

5. Select Add.



Adding an LSP

3. Establish a connection with the LSP.

1. In LSP > Connection. Enter:
   - LSP's XTM server address
   - Company login name
   - LSP ID
   - Password

4. Check if the connection with an LSP is active.

1. Go to Users > LSP > Connection
   a. A green dot: the connection is good.
   b. red the connection information has not been entered or is not correct.
2. You will get an email when a two-way connection has been established.

LSPs: Setting up a connection with XTM contractor

The contractor sends an email with the login information required to set up a connection.
Once you've received the email with connection details,

Admin users: Ensure subcontracting is activated in the Configuration > Settings tab

1. Go to the Users tab > LSPs
2. Add a new LSP, enter the contractor's details.
3. Select Add.
4. On the connection page, enter the connection details you have received in the email in the **Connection information from the LSP** section.
   Note: Make sure there are no whitespaces!
5. Select Save.

   A successful connection is set up and a confirmation message is sent by email to the contractor.

Check if the connection with an LSP is active.

1. Go to Users > LSPs > Connection

   a. Green dot: the connection is good.
   b. Red dot: the connection information has not been entered or is not correct.

Managing subcontracted projects in XTM

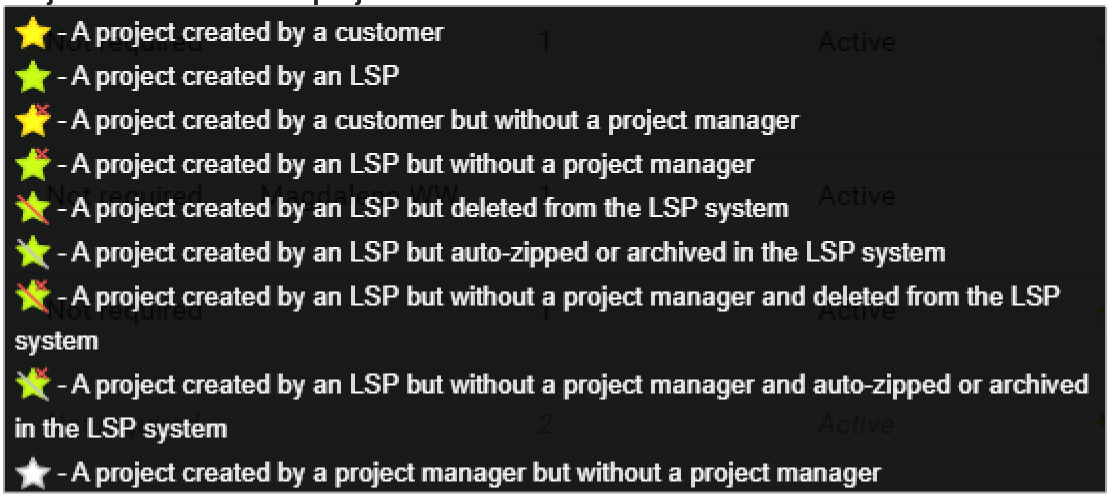
When a project has been assigned to an LSP it appears automatically in their project list.
A green star icon in the Project list indicates that it was created by an LSP.

The LSP can manage the project in a standard way.

Subcontracted projects naming convention

By default, the name of the project in the LSP's system is the same as in the contractor system. The LSP may change the name of the project in their system. Then both names will be visible in the LSP's system.

Project stars to indicate project creators and statuses



Archiving and zipping projects
Limitations in the interaction between a contractor and an LSP instance:

LSPs cannot:

activate projects archived by the contractor.

- archive or activate projects that have been created and assigned by the contractor unless the contractor archives or activates them in the contractor's instance first.

  Note: The status displayed in the project info tooltip will be Active until the subcontractor decides to manually archive the project in their system.

Projects in the contractor's instance

- **manually archived**:
  if the contractor manually archives the project, the same project is automatically archived in the subcontractor's instance – it is moved from the Current projects to Archived projects.
- **auto-zipped**:
  a project automatically zipped in the contractor's instance is greyed out in the subcontractor's instance. The status displayed in the project info tooltip will be Active.
  However, it is still visible under the Current projects list and it can be archived by the subcontractor. Information under the star icon provides more detailed information about what happened to the auto-zipped project in the contractor's system

LSP LQA results

Translation provided by LSPs can be evaluated and scored during the contractor's LQA workflow step.
LSPs can see percentage scores and download LQA reports for projects they have completed provided that these options are enabled in the LSP access rights settings of the contractor's XTM account. The same settings apply to projects where the LSP performed an LQA of translation provided by the contractor's internal resources or vendors. The contractor is able to see the LSP's LQA in steps that were created by the contractor. When generating a report, the data entered by the LSP is also considered.

4. XTM for Project Managers

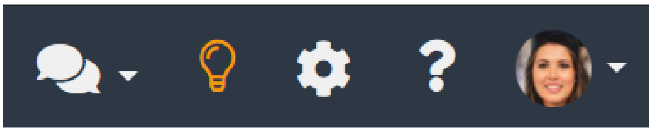
New features in XTM Cloud

How to access the What's new in XTM Cloud side bar
Select the light bulb icon from the top menu bar.
Features listed here are relevant to the user role of the logged-in user and are applicable to the latest XTM Cloud version.

Help and information

Select the question mark from the top menu bar to access the Help and information section containing:

- the current XTM Cloud version and the build date
- Contact information for the XTM Cloud support
- Contact information for the XTM Sales
- link to the XTM Community page
- Subscription Agreement
- XTM Cloud User Manual
- XTM Privacy Policy
- link to Knowledge Base
- link to XTM webinars
- Data processing agreement



Help and information side bar

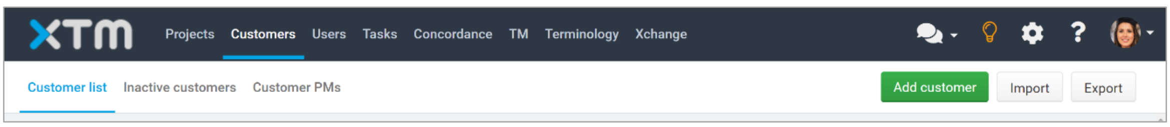
Customers

Adding Customers

How to add a customer in XTM

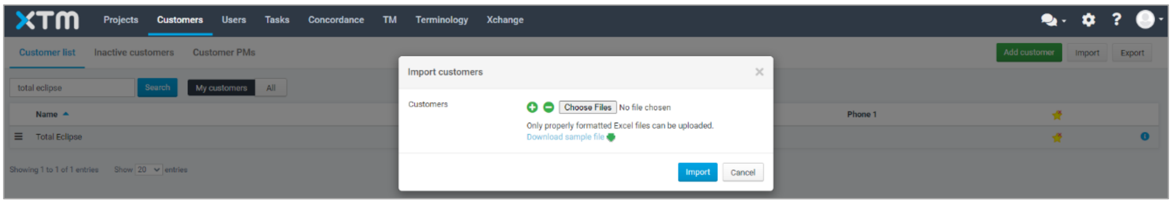
1. Select the Customers tab > Add customer.
2. Enter the customer's name. All other data is optional.
3. Select a default project manager for the new customer.
   If other project managers want to receive emails about the progress of their projects, add them as project watchers.
4. Select the Add button.

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



The Add customer button

Importing Customers



Importing customers

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

1) Create an Excel file of your data. Select the Download sample file green arrow to obtain an Excel template of the right format to import your customers into XTM.

2) Create an XML file of your data. An example of the required XML file is shown in chapter Specification for an XML import files.

   If you require a DTD or schema for the file, contact XTM International Ltd.

Exporting Customers

To export a list of Customers:

1) Go to Customers > Customer list > Export.

2) A zip file containing an Excel file is downloaded.

You can use the exported file, edit, or add customers in the Excel file and import the updated file.

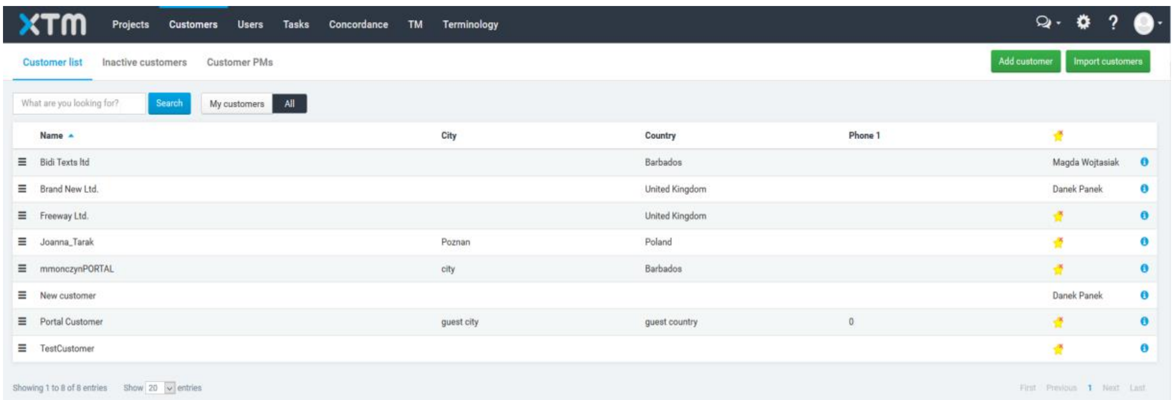
Searching for customers

How to search for a specific customer in XTM

Type in the search field and then select the search button. XTM will then search against customer name, city/town, country or phone1.

By default, XTM searches for and displays customers for whom you are the project manager and customers who do not have an allocated project manager.

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

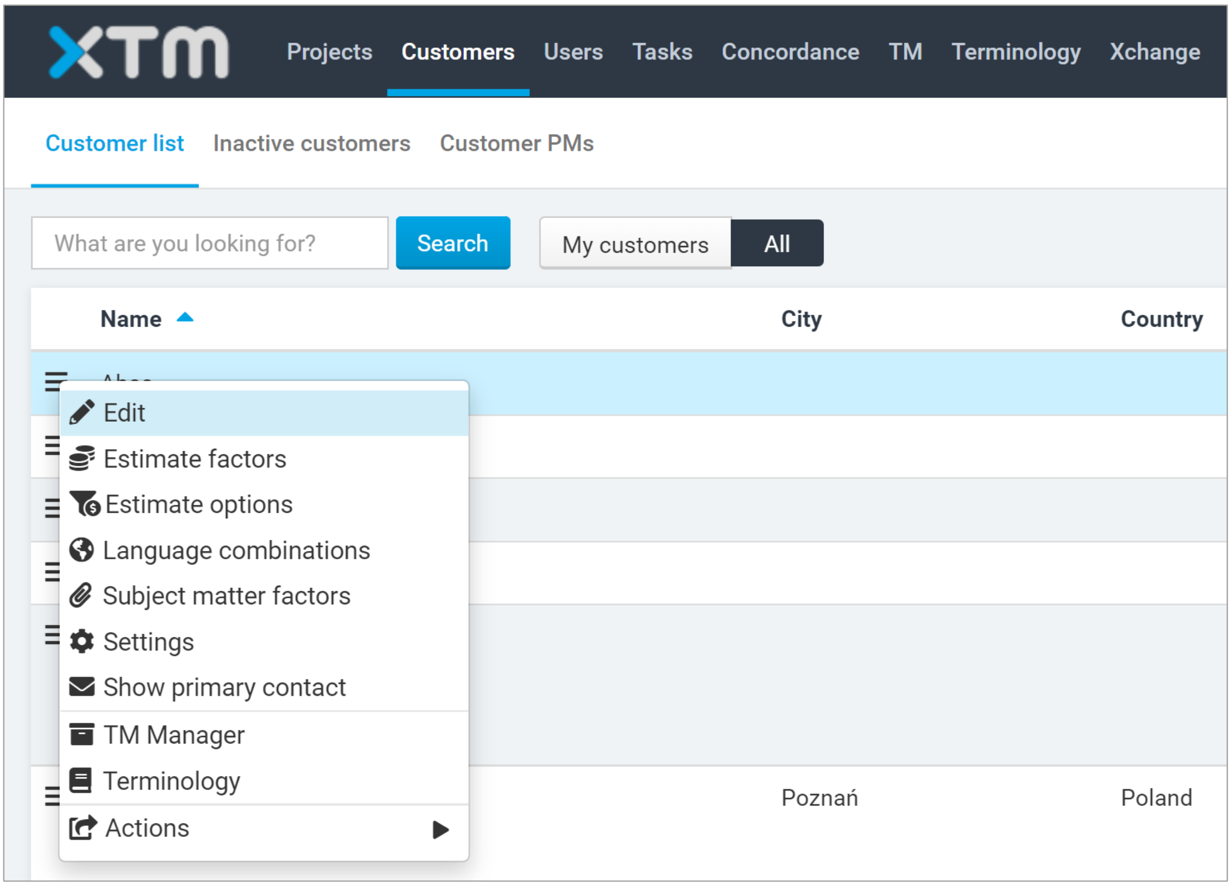


Searching for customer

Reviewing Customers

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

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



Context sensitive menu for Customers

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

Editing Customers

Customer Editor - Customer details

Using this tab, you can edit the Customer details.

- In the Customer list, select the context menu icon ☰ for the required customer.

1. Select Edit to enter the Customer details.
2. Make your changes and Save.

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

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

Customer Editor - Estimate factors

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

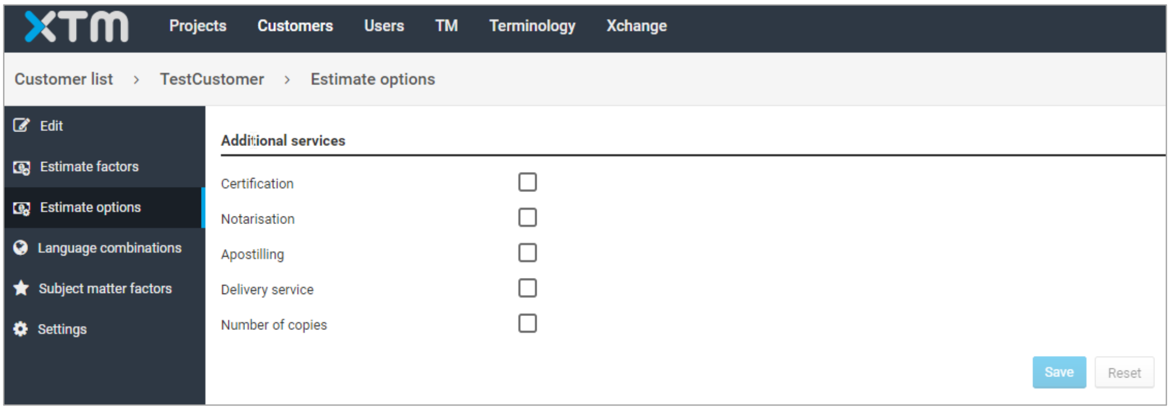
- Base cost per page
- Base cost per word
- Base cost per character
- Base pages per day
- Base words per day
- Base characters per day
- Minimum word count
- Minimum character count
- Minimum charge
- Minimum charge on discount
- Calculate estimates per page
- Currency
- Calculation method
- Work schedule
- Rounding point
- Paying VAT
- Project management fee
- Project discount days factor
- Project discount price factor
- Factors for the number of copies
- Speed factors – Premiums. There are three levels which become progressively faster and more expensive.

- Metrics factors for all the different types of matching.
- Price and duration factors for additional steps in the workflow
- Actual price or factors for document authentication

For more information about the estimate factors check Project Editor > Estimates.

Customer Editor - Estimate options

If you have XTM Portal, then you can choose to display additional services for each customer.



Customizing Estimate options

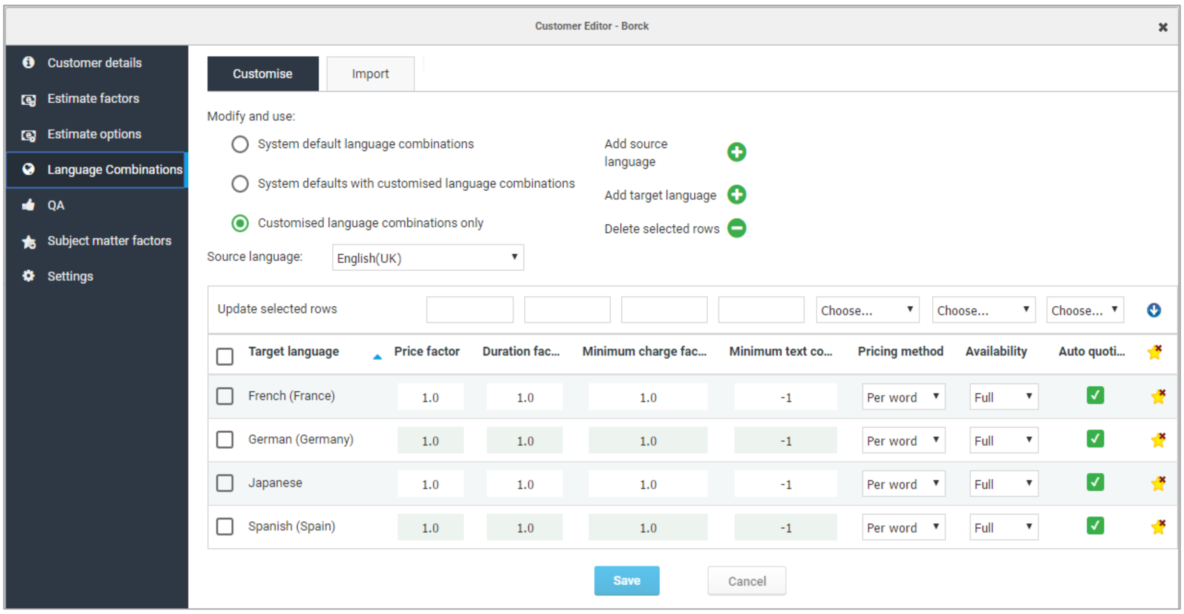
Customer Editor - Language combinations

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

Customise tab

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

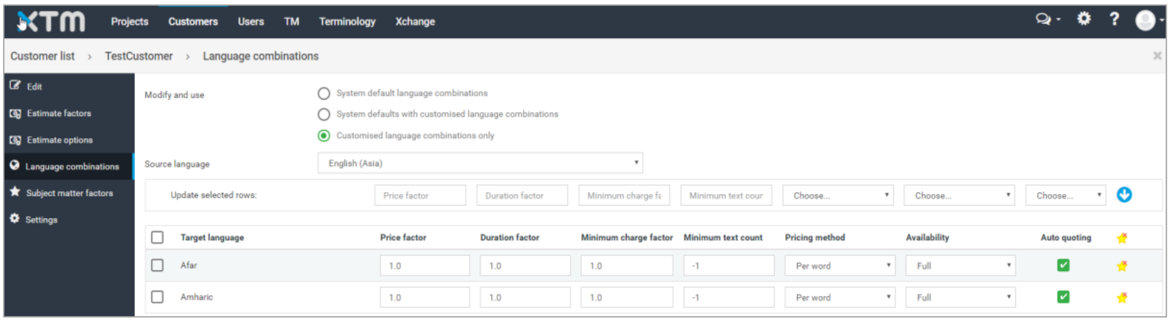
1. “System default language combinations”. This is the set of language combinations defined by the administrator.
2. “System defaults with customised language combinations”. This is the set of language combinations defined by the administrator in which you may have customised some parameters for the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



Customising language combinations

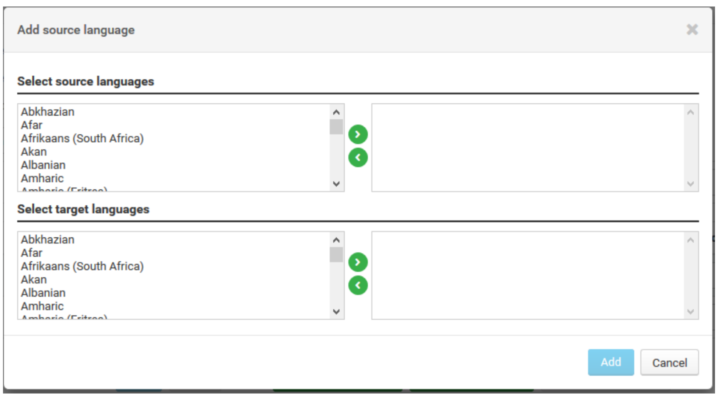
When you have selected one of the customized options it is possible to add and delete source and target languages.

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



Adding a target language

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



Adding source languages with their respective target languages

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

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

You can change:

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

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

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

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

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

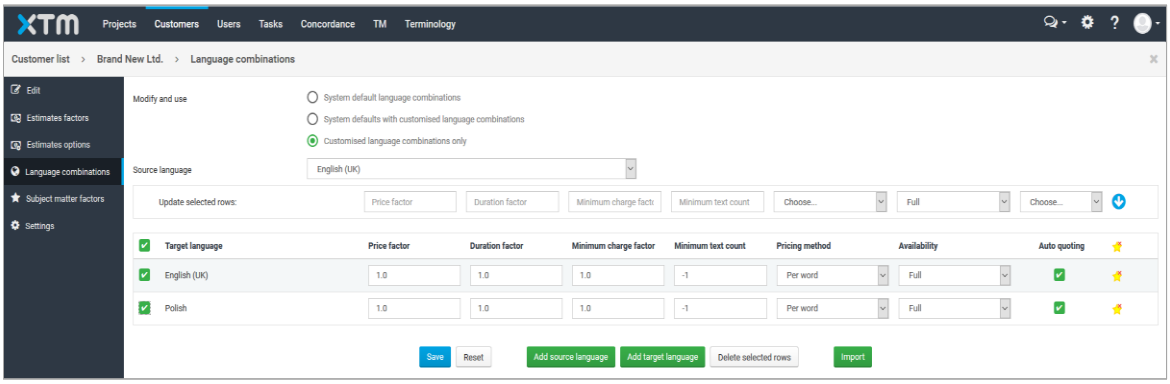
- **Availability** There are three available alternatives:
    - Full – This language combination is available to customers and PMs
    - PM only – Only project managers can create projects with this language combination.
    - Unavailable - You do not offer this language combination.

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

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

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

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



Using the update selected rows feature

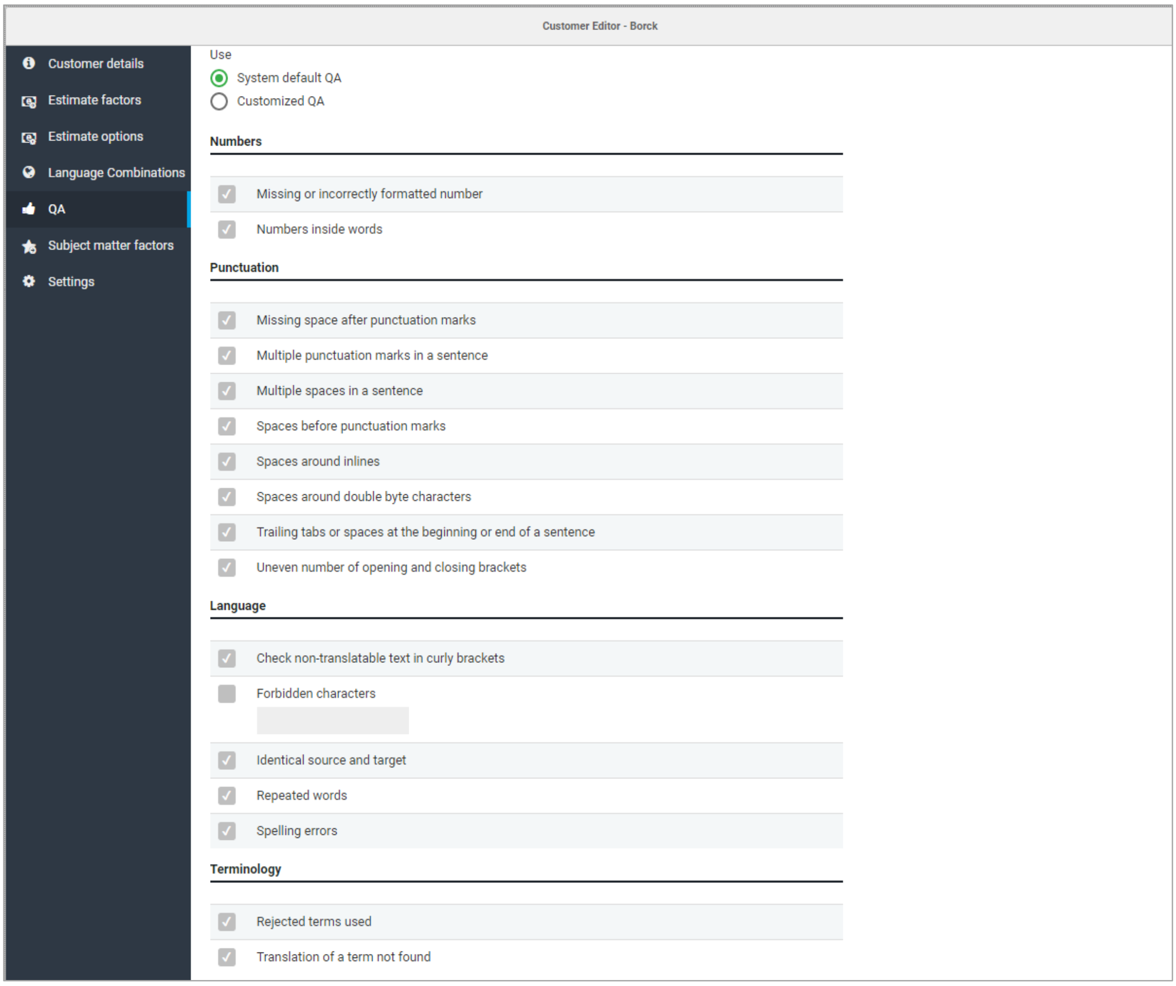
Import language combinations

Note: Before importing language combinations, make sure to correctly format the file containing the list of customers.

1. Select the required customer's context menu icon ☰ then Language combinations.
2. Click the Import button and follow the on-screen instructions.

Customer Editor - QA

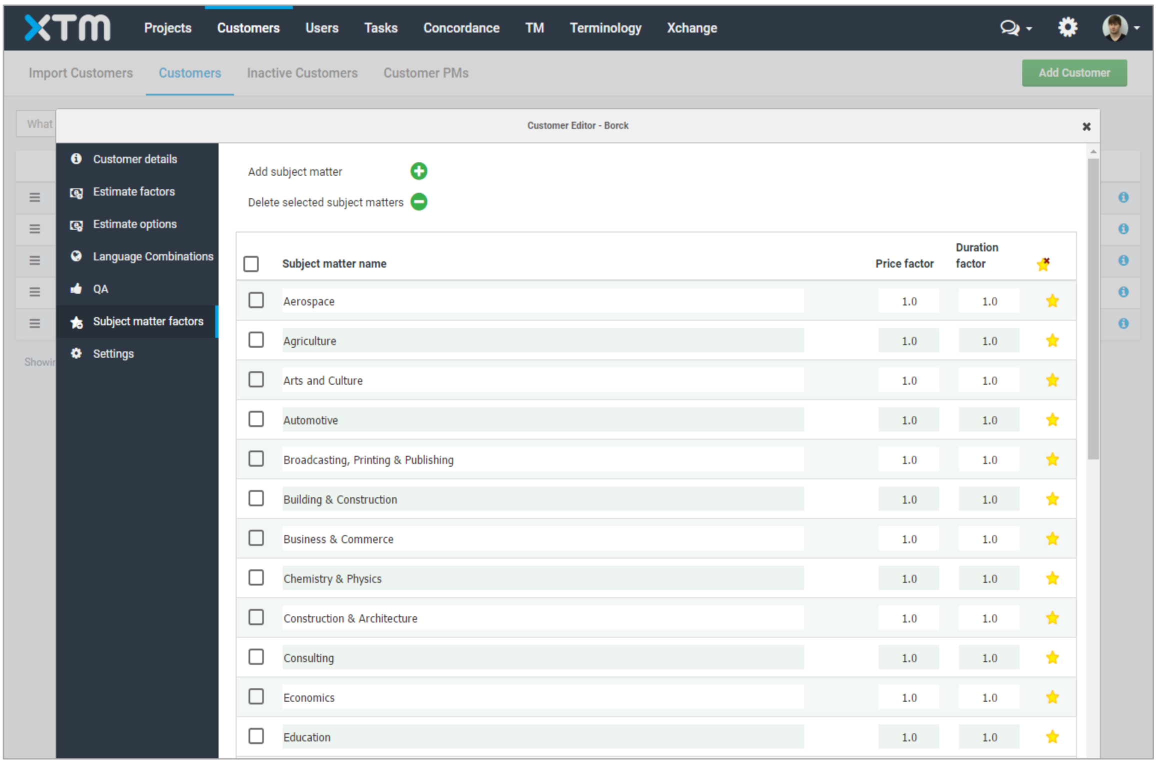
The QA tab allows you to set which QA tests should be performed for this customer.



Setting the QA options for a customer

Customer Editor - Subject matter factors

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



Customizing subject matters

Customer Editor - Settings

The following sections can be displayed in the Settings tab:

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

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

Project options: Check the Alternative translation box if you want to modify the default setting for this customer. Then enter the number of alternatives that you want to display in XTM Workbench .

Check the Use Anonymization box if you want to mask sensitive data in translation projects with a placeholder.

All of the settings available in the Customer Editor are described in detail in the Settings - Translation section of this manual. Source file preview: This is where you can enter the URL of an external system that will allow linguists to preview the source file while working on the translation.

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

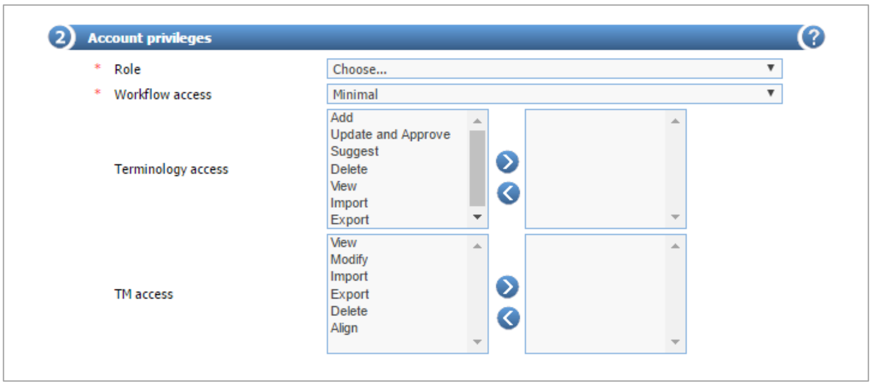
XTM automatically sends the following parameters to the service:

- fileName
- srcLang
- tgtLang
- projectName
- projectId

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

Adding a customer project manager

From the Customers tab Select Add Customer PM and fill in the fields.
In section 2, you can set the access rights of the customer PM.



Section 2 of Adding a customer PM

The Role field determines whether the customer PM can make any changes to a project.

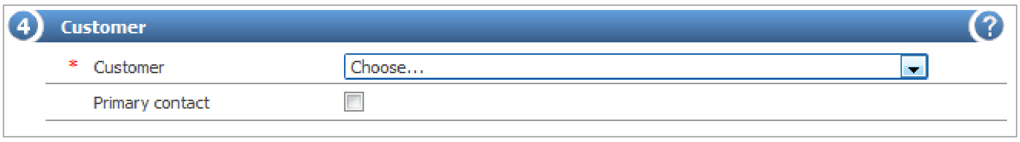
- A manager can make changes to information on the general tab but not to the workflow.
- A viewer cannot make any changes at all

The Workflow access field has 3 options:

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

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

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



Section 4 of Adding a customer PM

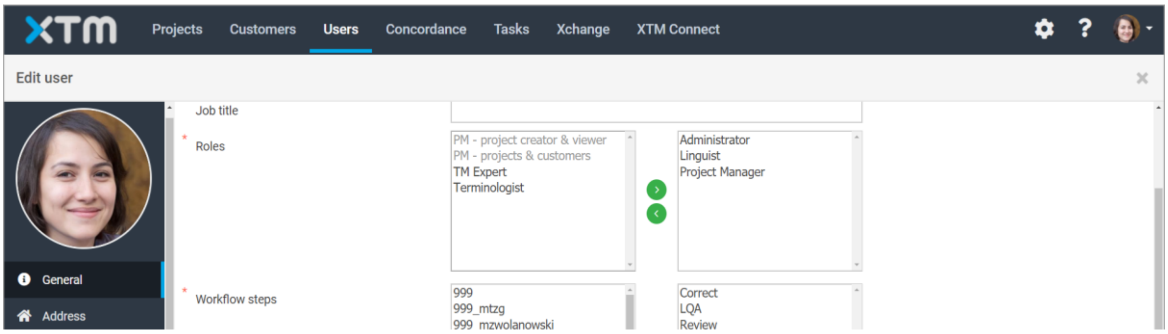
Users

Adding users

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

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

User Editor - General



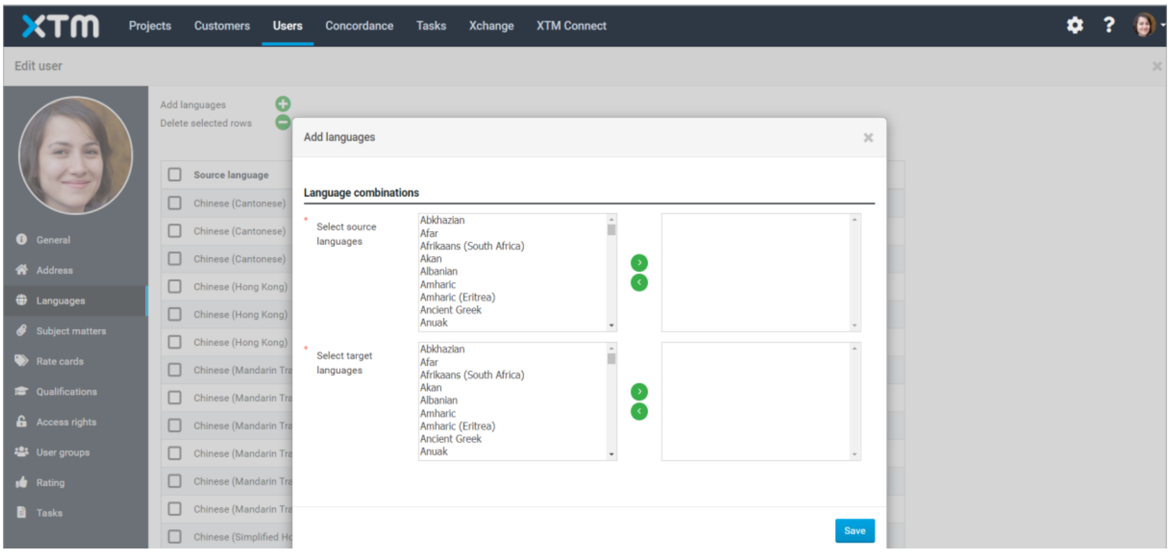
Users – General info

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

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

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

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



Users – Languages

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

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

For each rate card you can define:

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

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

If you choose factors, you must enter a base price which will be multiplied by the percentage values you enter for the different types of match in each step, to work out the cost. If you use actual prices then you should enter the actual prices for each type of match for each step.
For both types of calculation, you can also define:

- The number of words per day
- A minimum charge

Under the General fixed price heading you can set:

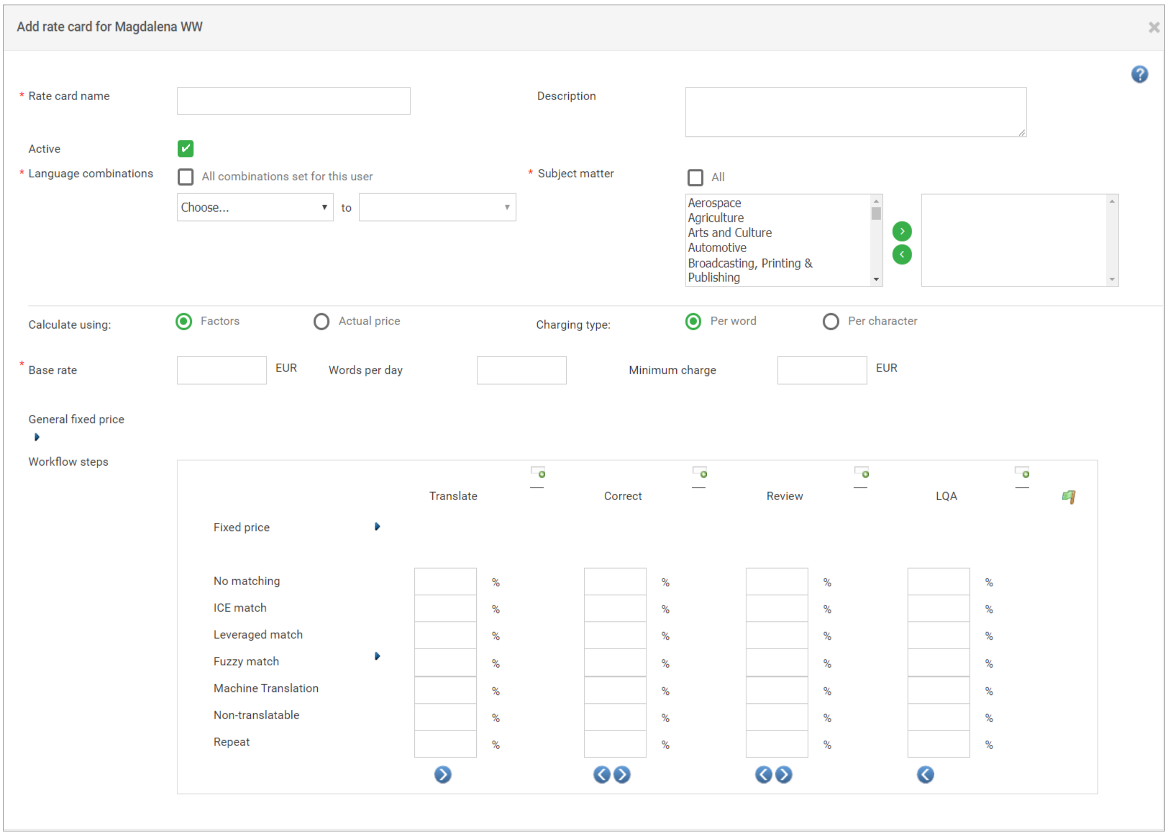
- A fixed price per project
- A fixed price per language,
- A fixed price per file
- A management fee percentage

Then for each workflow step you can define:

- A fixed price project
- A fixed price language
- A fixed price file
- A management fee percentage
- Rush job premium – A rush job premium percentage
- Minimum charge
- Price per hour.
- The rates for fuzzy matching factors or actual prices can be set as a global figure or individual figures for each band.

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

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



Users – A rate card

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

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

Customers

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

Projects

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

Editor

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

LQA

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

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

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

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

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

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

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

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

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

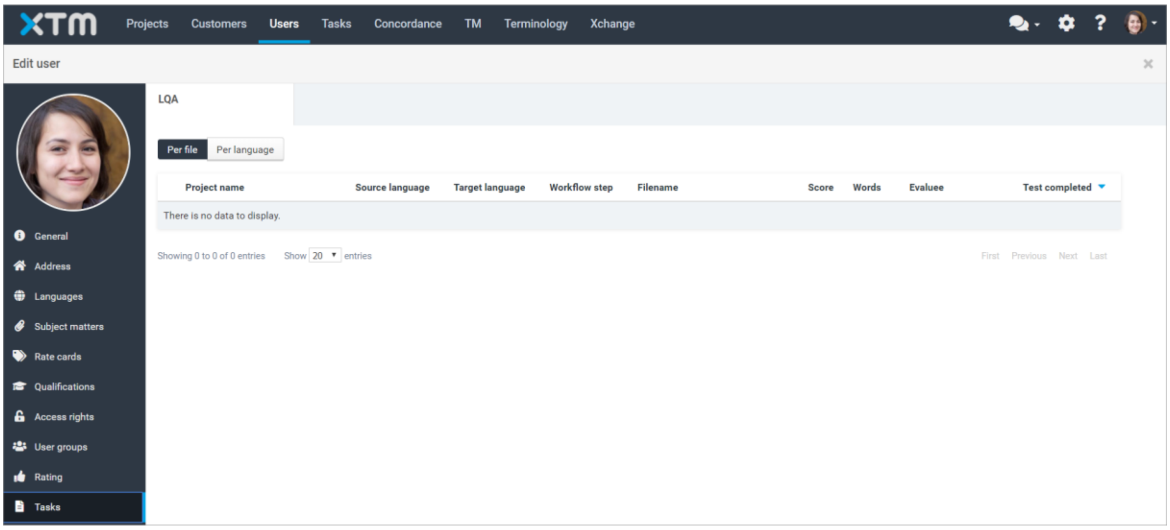
The Quality tab displays the Linguistic Quality Assessment (LQA) results for the linguist. Results are collected from LQAs that are performed in the workflow step after the step to which the linguist was assigned. LQA results are stored for linguists only when the option "Yes, save result in user record"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

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

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

User Editor - Tasks: There are two options available: LQA and Statistics.

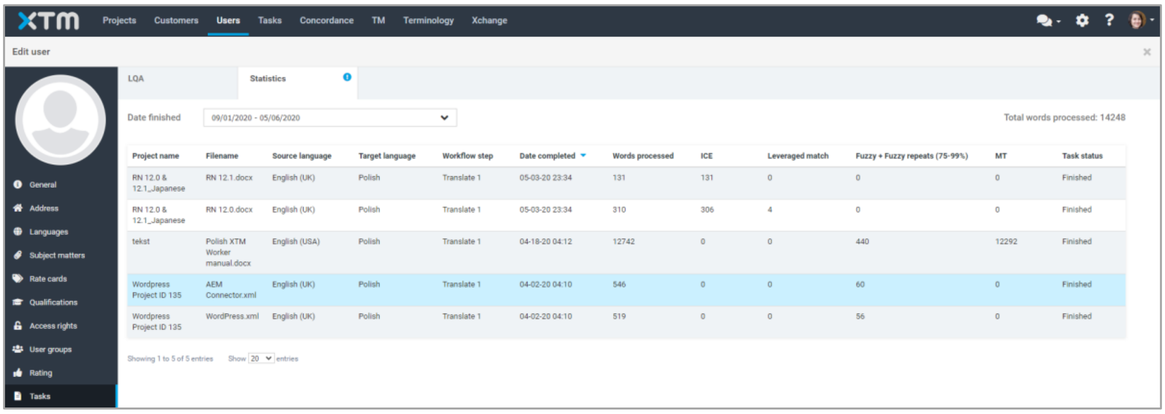
LQA lists all the LQAs performed by the user. Project Managers can open the Project Editor, download the LQA report or delete it from the list.



Access to LQA reports

Statistics

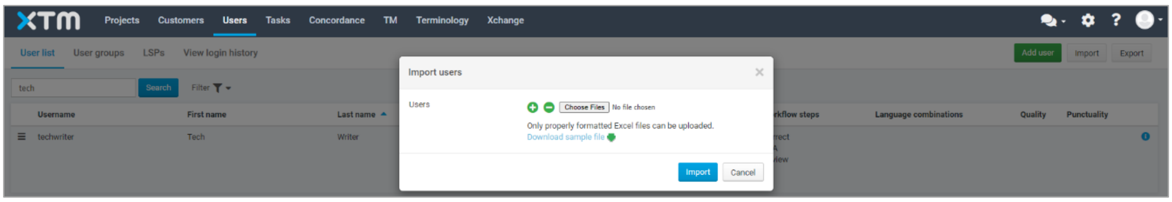
Project Managers can see a list of tasks completed by each linguist along with the number of words processed by them. This option is available only for internal tasks, not subcontracted tasks. The table contains: Project name, File name, Source language, Target language, Date completed, and Words processed. A filter for completion date is also available. The number of words processed by a given user is the value taken from Statistics - source words total count.



Users – Tasks

The Statistics option can be accessed by linguists if it is activated by the PM (Configuration > Settings > Translation > Workflow and access > Linguist general options: Show statistics of finished tasks to linguist).

Importing users



Importing users

If you have a list of linguists in another computer system, we recommend that you export the list into a Microsoft Excel file, ensure the formatting is correct and then import this file into XTM.

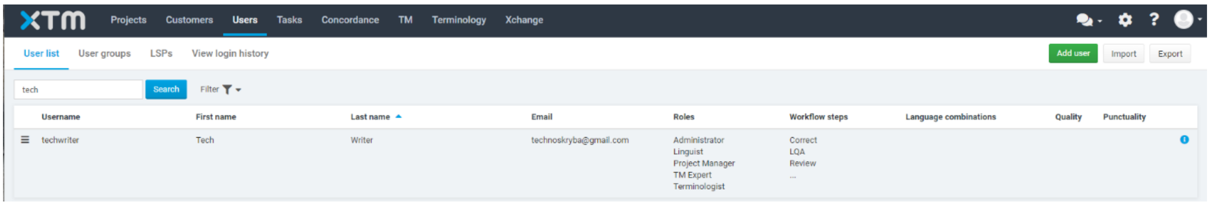
1) Go to Users > User list > Import.
2) Select the green arrow to download a template of the Excel file.
For details, go to Excel specification file to import linguists.

Exporting users

A list of users can be exported to an Excel file.

1) Go to Users > User list > Export.
2) A zip file containing an Excel file is downloaded.

You can use the exported file, edit, or add users in the Excel file and import the updated file.



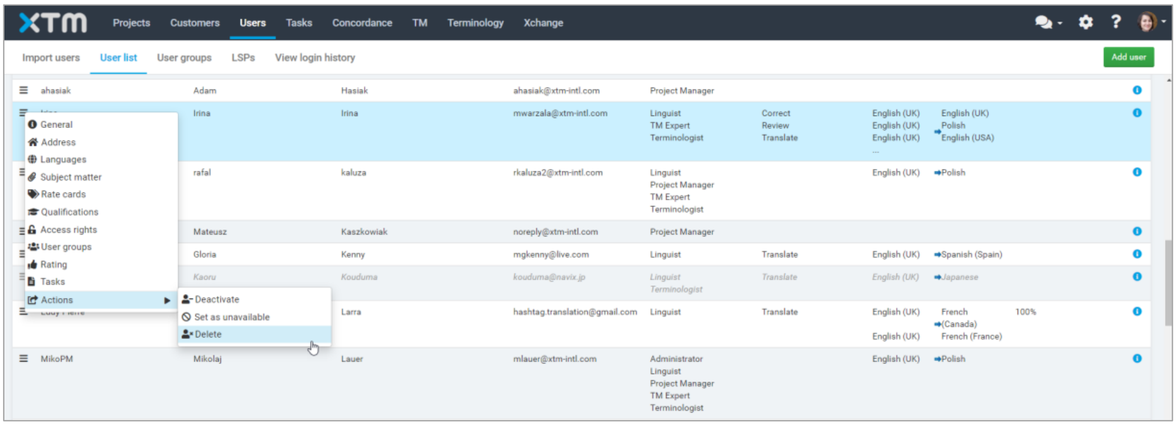
Exporting users

Managing Users

You can view and manage all users in the Users tab by selecting "Users" in the top navigation bar. To modify a record, select the menu icon ☰ in the first column to bring up a context menu. From the context menu it is possible to:

- Edit user settings, e.g., Address, Languages, Rate cards, etc.
- Under Actions: Activate/Deactivate a user
- You can deactivate users to prevent them from logging in and performing any action in XTM.
- Deactivated users:
  - are greyed out on the User listing page and labelled "inactive"
  - cannot log in to their XTM accounts
  - remain assigned to their current projects
  - cannot be assigned to new projects, i.e. cannot be selected in the workflow menu or in the user groups menu
  - cannot be selected as project managers
  - do not receive email notifications
  - cannot be found in the Advanced search under the Projects tab
- Set as Unavailable/Available to highlight that the user is busy, on holiday or sick etc. and will not be involved in any new projects until set to available again
- Unavailable users:
  - can still log in to their accounts and see their tasks, accept/decline group tasks and work in the XTM Workbench
  - remain assigned to their current projects
  - receive emails about workflow assignment and unassignment
  - cannot be assigned to new projects, i.e., cannot be selected in the workflow menu, but can be selected in the user groups menu
  - cannot be found in the Advanced search under the Projects tab

- Unblock a user that has been automatically blocked by the system
- Delete a user



Context menu for linguists

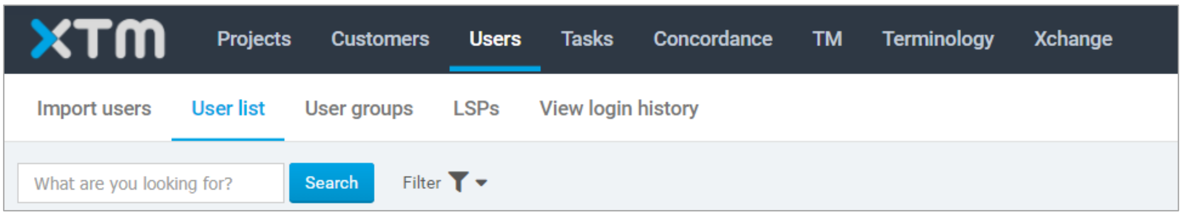
Deactivated user – User list page

Unavailable user – User list page

Selecting on the info icon in the last column displays further information about the user.

Searching for Users

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



Searching for users

User Groups

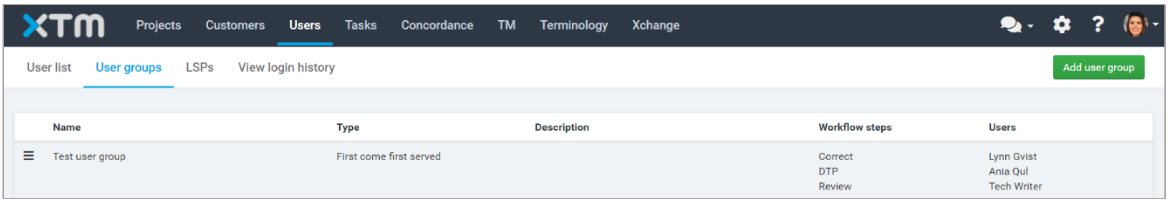
XTM allows you to create the following types of user group:

- First come first served
- Allocation order
- Chat

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

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

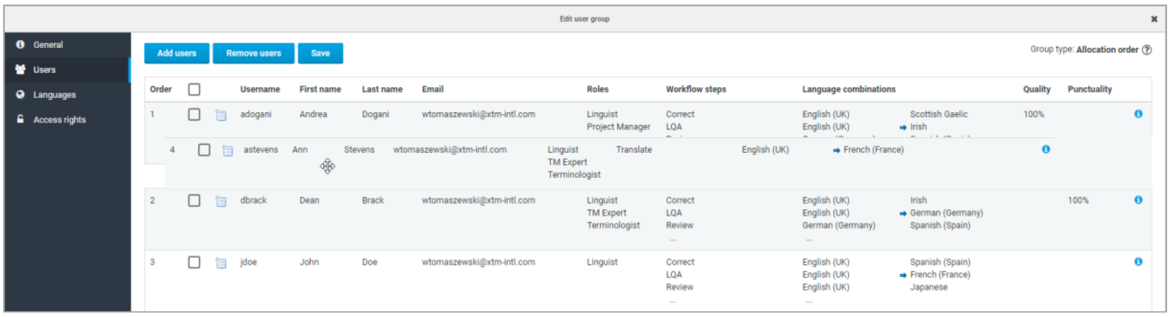
Selecting on the User Groups tab brings up a list of the existing user groups.



List of user groups

To add a new user group, Select the add button and enter the details.

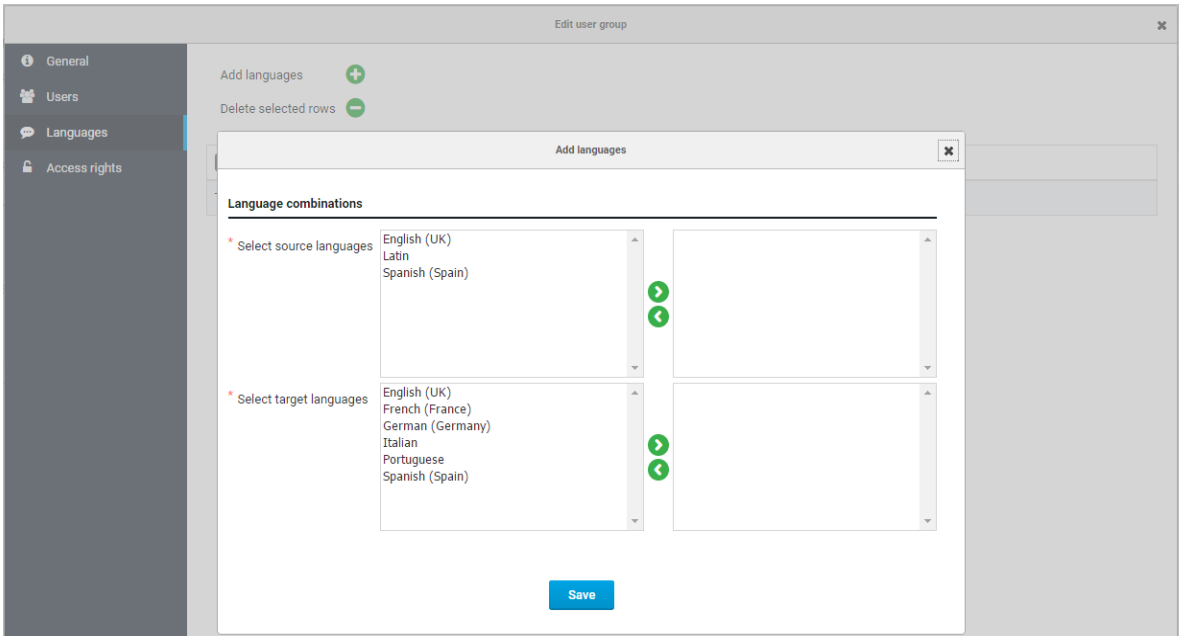
When you have selected the Allocation order user group type. You can select the order in which users of this group are automatically assigned to tasks in the workflow. To change the allocation order, drag and drop a user into the correct position in the order.



Changing users' allocation order in an allocation order user group

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

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



Specifying the user group language combination

Creating Projects

When you receive a translation request you should:

1. create a new project
2. Upload files
3. Define workflow
4. Assign a translation team to the project

XTM automatically analyses the documents, extracts the text and applies the TM. You then assign the linguists to the tasks in the workflow. They in turn will receive an email to advise them they have a pending job. They can Select the link in the email, log in and start translating or reviewing. The final step of this workflow is when you are advised that the translation and review is complete. XTM automatically creates the target file making it available for you to download.

To create a new project in XTM:

1. Select the Projects tab
2. Select the green Add project button.
3. Create new project window contains several sections. The options available during project creation depend on the configuration and permissions set by the XTM administrator.

- General information
- Custom fields *(optional)*
- Translation
- Workflow
- Settings (optional)
- Machine translation *(optional)*
- Tag setting *(optional)*

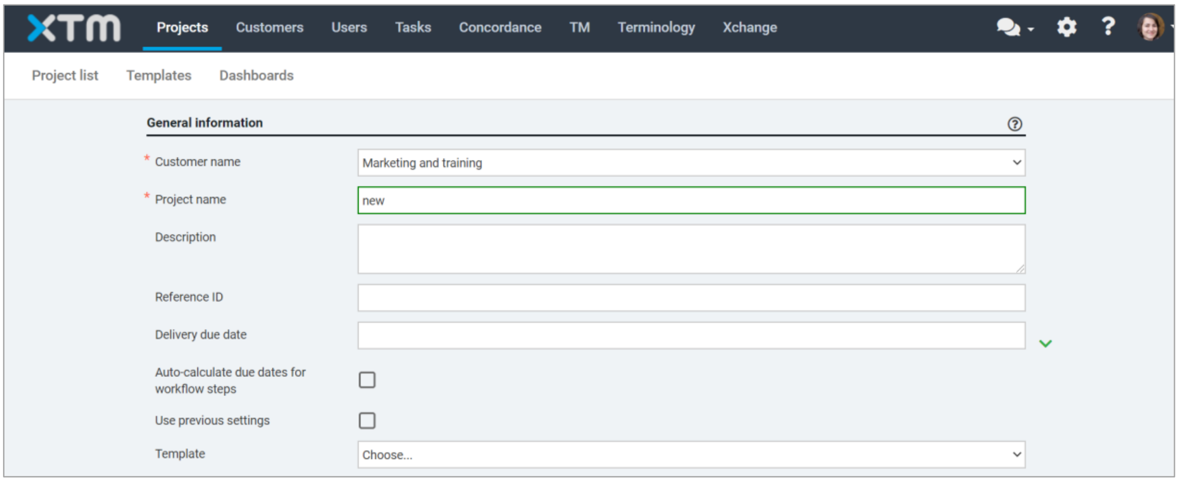
Mandatory fields are marked with a red asterisk (star) *.

General information in the project creation

Before creating a project, the customer for this project must be created. Selecting a particular customer determines the available language combinations.

1. Select the customer's name from the dropdown list (required).
2. Type a project name (required).
3. Enter optional information:
    a. description
    b. reference ID
    c. subject matter
    d. due date
4. Auto-calculate due dates for workflow steps:
   If enabled in the Configuration > Settings > Projects tab, two optional due date fields are available:
    a. Workflow start date
    b. Workflow due date
       You can fill them in to increase the accuracy of automatically calculated due dates or leave empty to use the project creation and delivery due dates instead.

5. Use previous settings option: all settings from the last project for this customer are filled automatically.
6. Template: select global or customer specific templates from the dropdown.



Creating a new project: General information

Custom fields in the project creation

Custom fields section shows custom fields enabled by the XTM administrator.

Translation section in the project creation

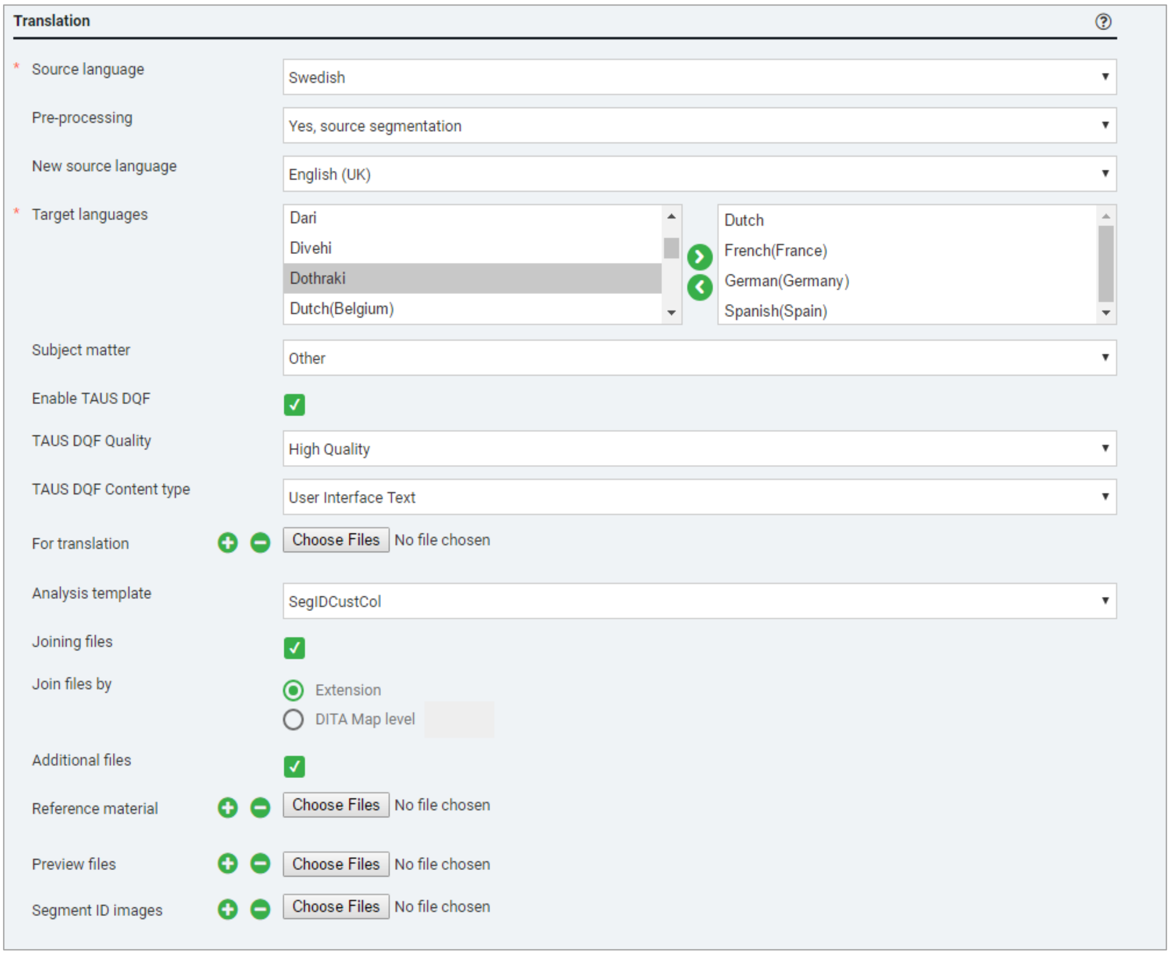
1. Enter the **source language** (required).
2. **Pre-processing** is available during project if it has been activated in the Configuration tab. Pre-processing can be used to:
    a. lock segments so that they are not taken for translation
    b. edit the source text prior to the translation when the new source language is the same as the original source language
    c. make use of a pivot language in the translation process: source language is firstly translated into one language and then that target language becomes the new source for the translation into other target languages.
3. Select one or more **target languages** from the lists (required).
4. **Subject matter** defines the field of knowledge necessary to provide a meaningful and accurate translation for a project.
5. **For translation** (required): select Choose files to upload the files for translation. Locate the file, select open and the path to the document will appear in the field.

   You may upload a .zip file that contains multiple files for translation. XTM limits the file size that you can upload at one time to less than 150MB. If you have files that are more than 150MB, compress them into a zip file to reduce the file size.
6. **QA profile** Select one of the available Quality assurance profiles.
7. **Filter template** used to specify configuration for identifying translatable text in a document. Find out how to configure filter templates.
8. **Analysis template** this field become visible when an analysis template has been created for the account.
9. **Joining files** allows you to merge files with the same file format. When the project is created, the joined files will be displayed as one file for each file format. More joining file options, such as Join files by, can be configured on the Configuration tab >

Settings > Projects > Joining files in sets. This simplifies managing the translation workflow. To use this feature all the files that are to be joined should be uploaded in a single zip file. **Note:** joining files is not working for Visual mode

10. **Additional files**: opens additional options:
    a. Reference material: upload additional information that may assist in the translation process, such as a style guide, or a glossary.
    b. Preview files: Add images that do not need to be localized. Find out more about [Adding preview images]
    c. Segment ID images
11. Segment filter profile.

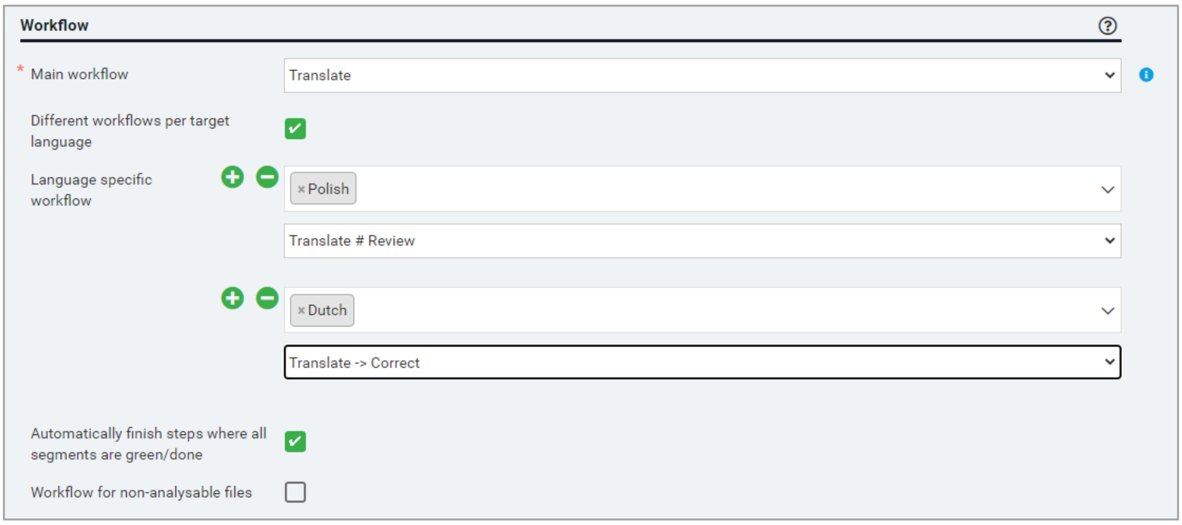
The updating of the preview files must be done by the principal project manager and is not available to subcontractors.



Creating a project – Translation section

Workflow

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



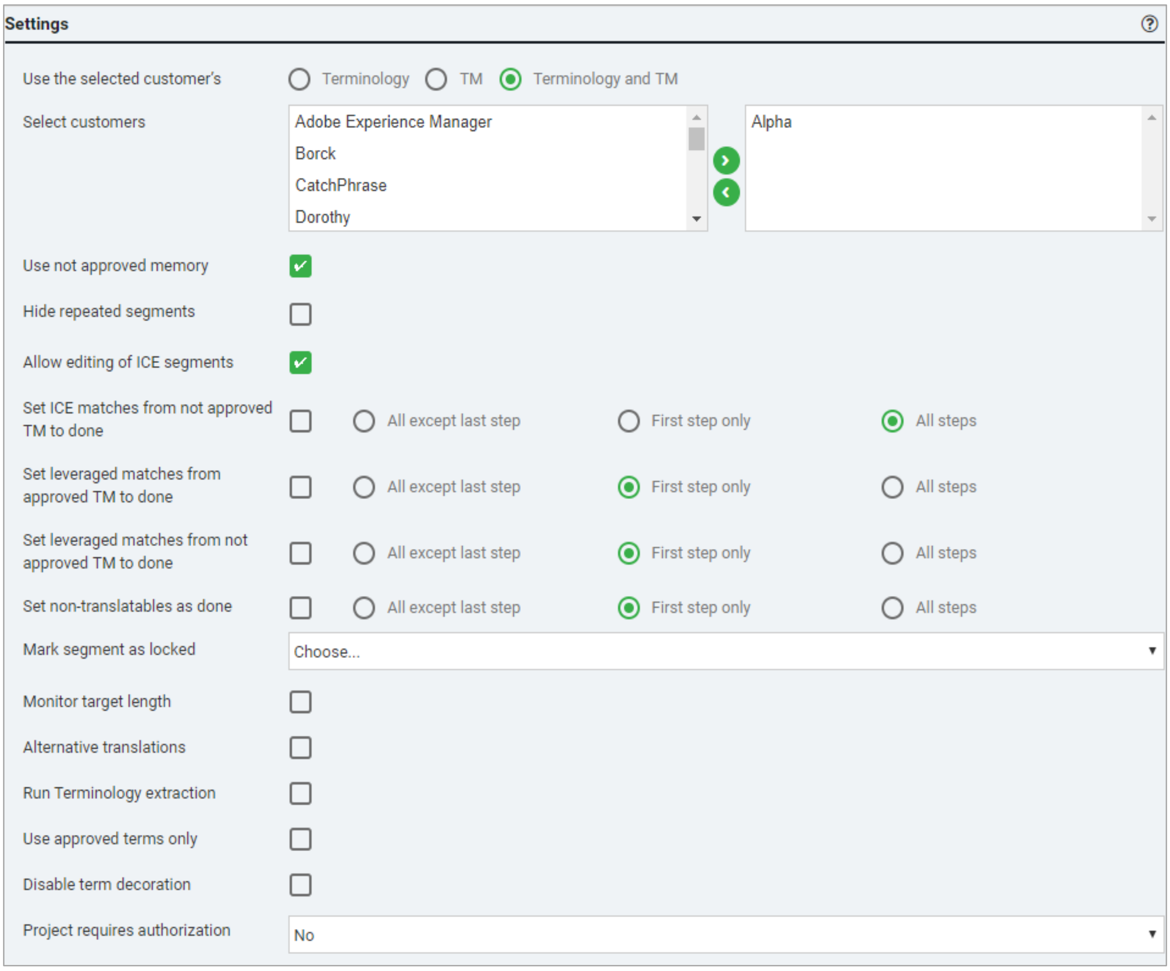
Creating a project – Workflow section

Different workflows per target language – in multilingual projects, different workflows and different due dates can be defined for each target language.

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

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

Project Settings during project creation



Project creation – Settings sections

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

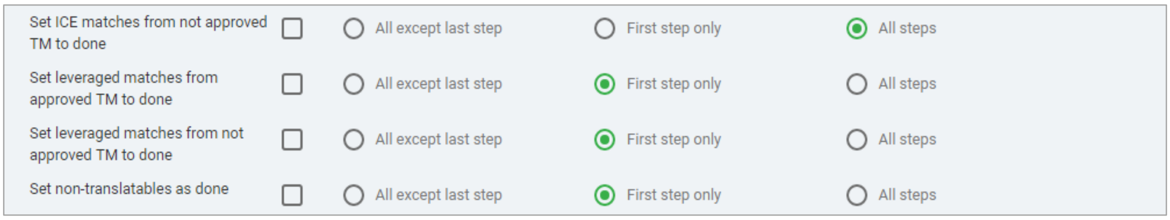
Use not approved memory. By default, XTM only uses approved TMs for matching. However, you can use non-approved TM by checking the box "Use not approved memory". It is important to note that XTM automatically approves TM when a project has been completed, so by selecting this option you may be using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

Hide repeated segments. The option allows you to hide repeated segments when repeats exceed a specified percentage part of a file. When the specified threshold condition is met and the project is being opened in the XTM Workbench a filter called "All segments except repeats" is triggered automatically. The filter hides repeated segments but displays all other segment types including the source of repeats.
The feature includes cross-file repetitions. Repeated segments are automatically hidden in XTM Workbench and then silently propagated to all subsequent repetitions.

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

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

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



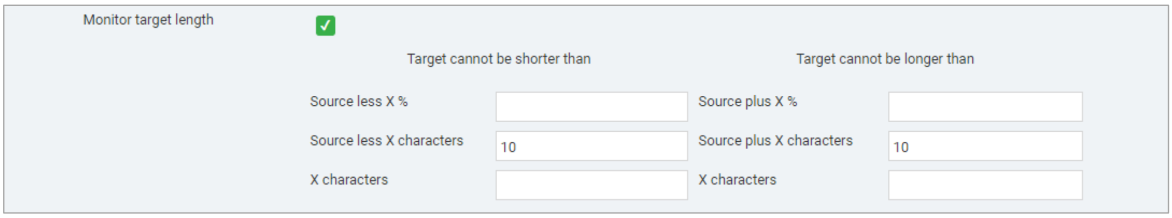
Project creation – Settings – Setting matches to done

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

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

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

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



Defining the upper and lower limits of the target text

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

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

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

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

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

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

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

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

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

Adding machine translation during project creation

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

- Amplexor
- AWS Amazon Translate
- CrossLang
- Custom MT
- DeepL
- Google Translate
- Iconic
- KantanMT
- Lingo24
- Lionbridge GeoFluent
- Microsoft Translator
- Omniscien Technologies
- Oneliner
- SDL BeGlobal
- SmartMATE
- SYSTRAN Pure Neural™
- Tauyou

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

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

With Google, Amplexor and Microsoft Translator you can decide when segments are sent for machine translation: during project analysis, on a segment-by-segment basis in the XTM Workbench or both.

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

Tag settings in the project creation

Tag settings section is available during project creation if it tags, and penalty profiles have been set up in the Configuration > Data tab.

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

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

Note: TM language variant penalty profile supersedes any other TM penalty profile!

The tag settings section

Word count usage

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

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

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

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

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

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

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

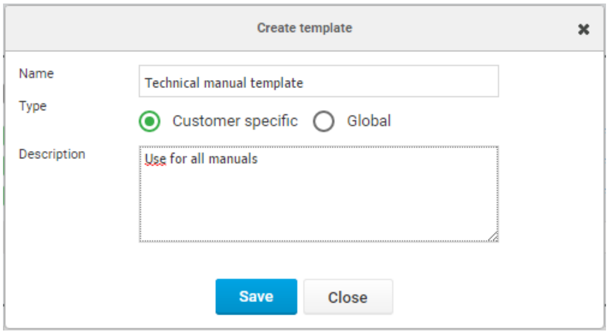
Project templates

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

Creating project Templates:

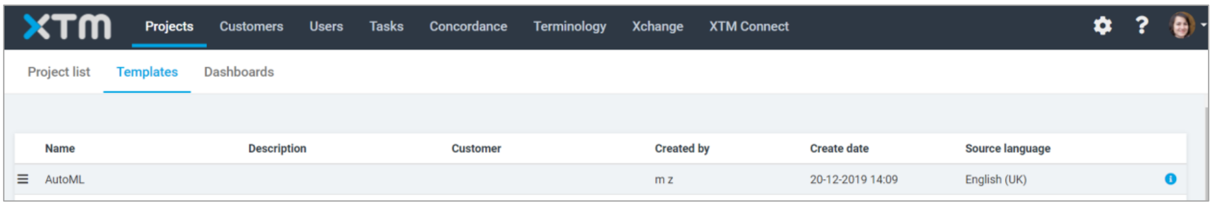
1. When creating a new project and selecting on the Save as template button > Create template window.

2. From the Project list menu > Create template window.



The Create Template Window

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



The Project Template line listing

To delete a template:

1. Go to Projects > Templates.
2. Select the menu icon ☰ in the left-hand column and select delete.

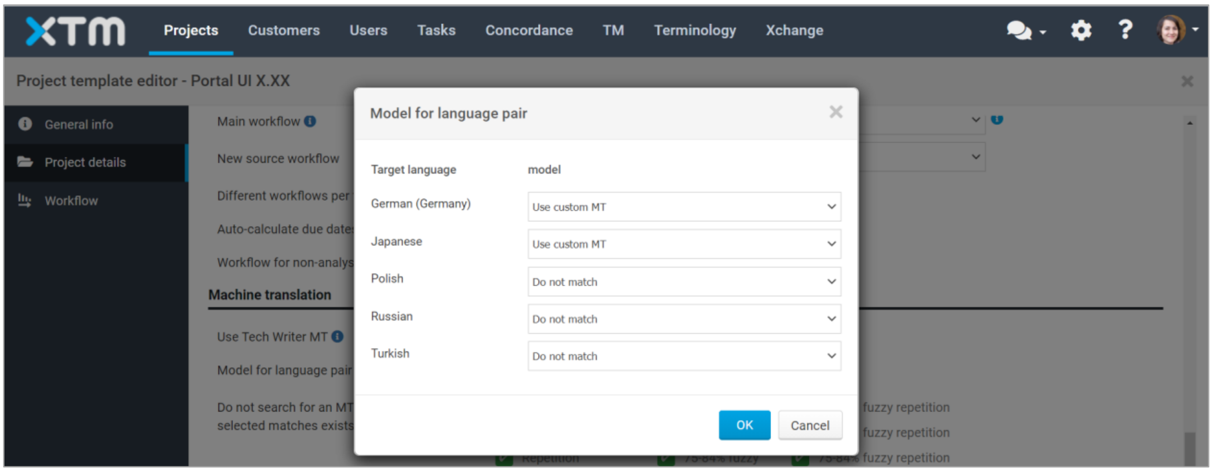
To edit a template

1. Go to Projects > Templates.
2. Select the menu icon ☰ in the left-hand column and select edit.

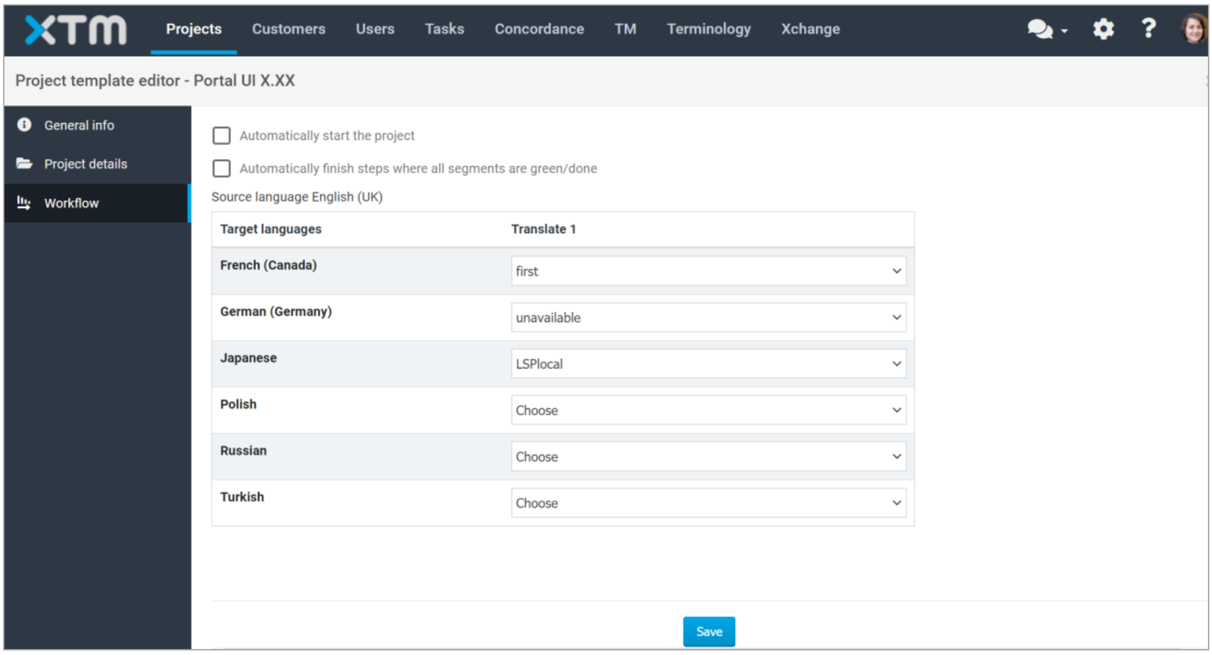
Project details > Machine translation

Before you start: This option requires configuration of Custom MT – see here.

With a customized machine translation engine configured, you can set up a separate model for each target language of your project determined in the project template. If you set up more than one custom MT, you will be able to define a “model” for each of them. The model offers an option to use the Custom MT for a given target language or not use it (“Do not match”).



Models selectable for language pairs



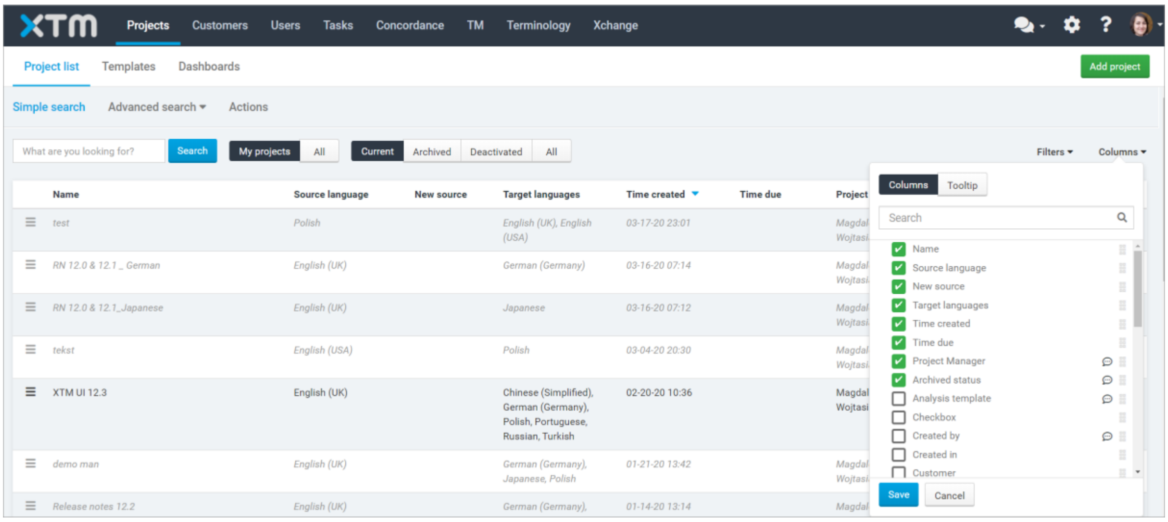
The Project Template Editor – Linguist assignment

Project list

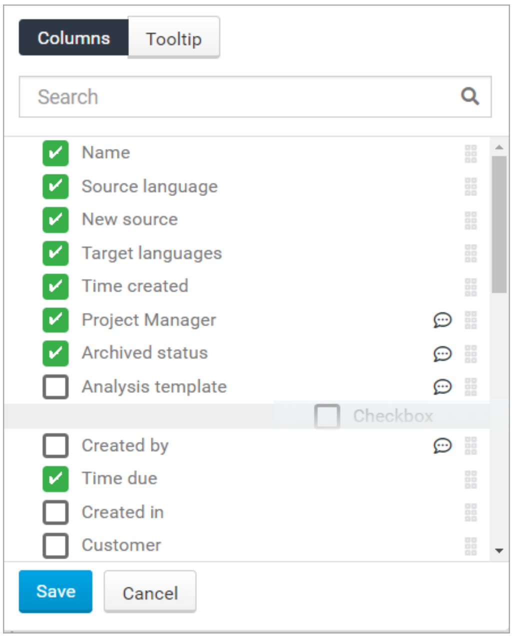
Customizable columns in the project list

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

In the Tooltip section of the window, select the tooltips you want to display when you place the cursor on the info icon ! of a project.



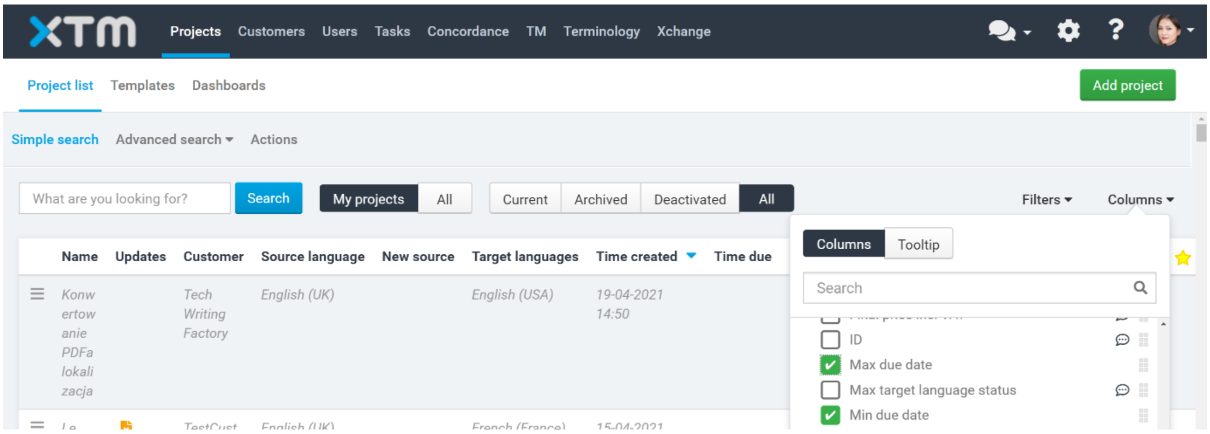
Project list



Drag a column name to change its position on the Project list

Project managers can also choose to display:

- the minimum and maximum due dates
- updated source files
- updated due dates
- Remaining WWC (Remaining Total Weighted Word Count)
- Total WWC (Total Weighted Word Count)



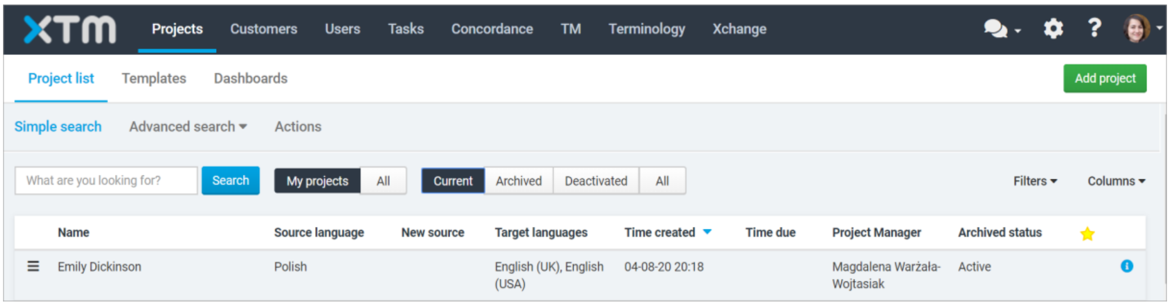
Adding min and max due dates column to the Project list

Searching for Projects

When displaying the list of projects first decide if you want to view your projects ("My projects") or projects owned by all project managers ("All"). Then you have the option of viewing Current projects, Archived projects, or All projects.

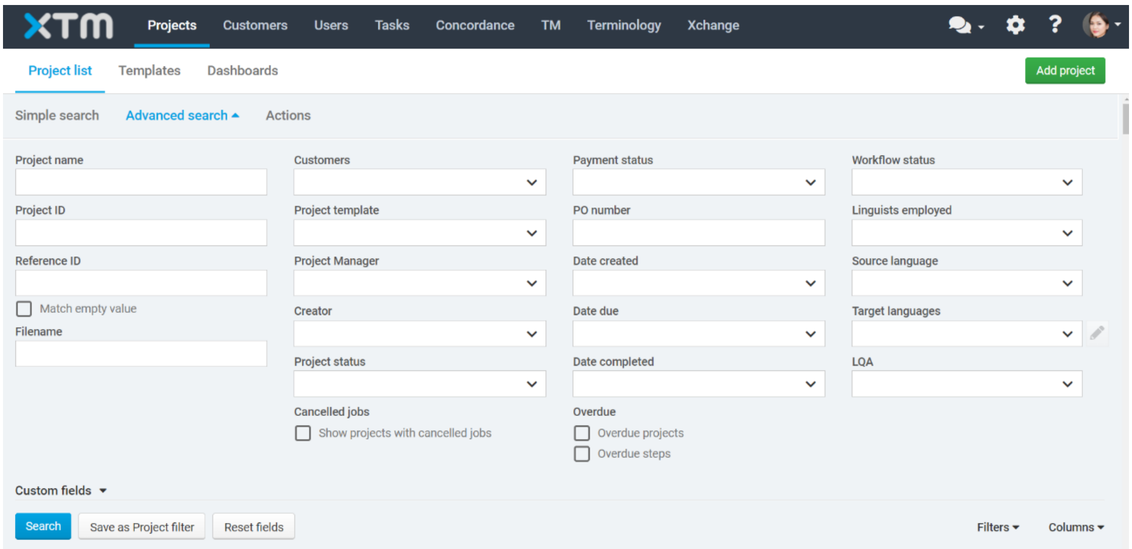
To refine your search there are two options for finding projects – the Simple or Advanced search.

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



Project simple search

The advanced search. Select advanced search tab to make it active.

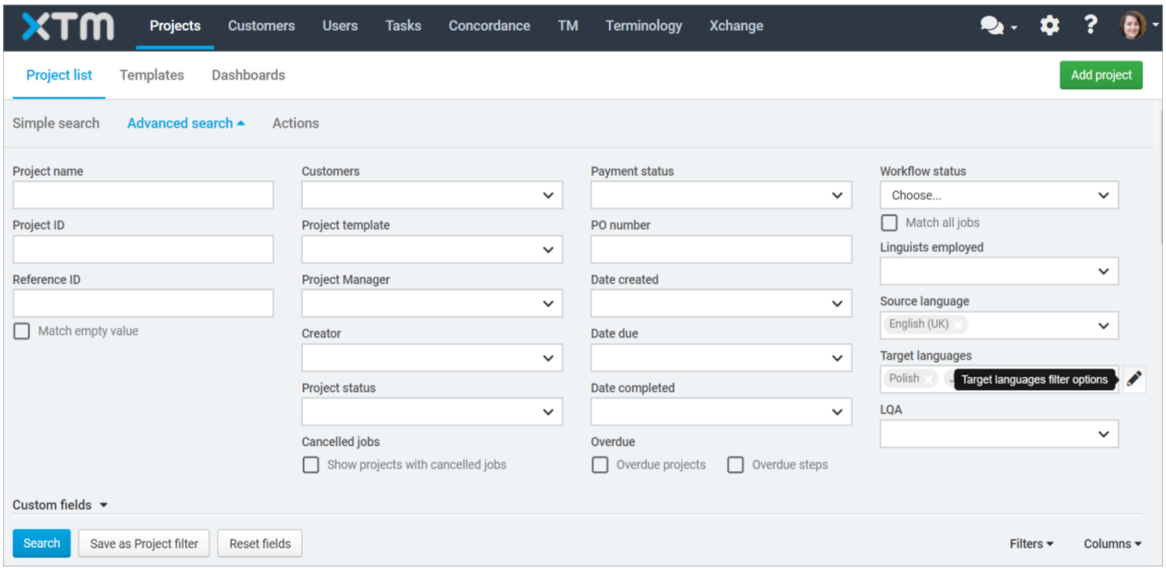


Project advanced search

For the target language field, once you have selected target languages, you have the option to find projects containing:

- any of the selected target languages
- all the selected target languages
- only the selected target languages

Select the pen icon by the target languages field to open a pop-up window where you can specify these criteria.



Advanced search for target languages

Additionally, you can filter by the target language workflow status:

- Started
- Not started
- Finished
- Not finished

Viewing active projects

1. Go to the Project list > Advanced search.
2. In the Workflow status dropdown select **all** relevant workflow steps (Translate, Correct, Review etc.)
3. Select Search.

The list of all active projects is displayed in the Project list.

For the three date fields (Date created, Date due, Date completed) there is a dropdown list of date ranges, however you can also enter a custom date range.
When you choose Custom range from the dropdown list a new field appears below where you can enter the required dates.

Finding multiple projects in a single request

The advanced and simple project search options allow you to search for multiple projects in a single request.

1. Go to the Project list > Simple search.
2. Enter project names into the search box and separate them with a spaced vertical line "|" (pipe character).
   The name may be composed of more than one word, for example:
   one text | text2 | string3.

Tip: If you enter part of the project name, all projects containing that word* in the project name will be listed.

Smart filters

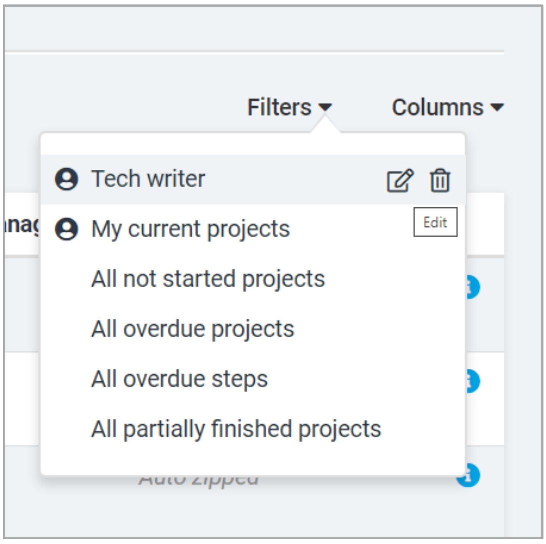
Smart filters are advanced search settings saved for later use. You can apply smart filters to the Project list to quickly find the relevant projects.

Smart filters are available for use on the Project list. Selecting a filter will perform the configured advanced search and will efficiently return the matching results.

How to create smart filters

1. Go to Project list > Advanced search.
2. Decide if the filter should be available only to you (Private) or to all project managers (Public).
3. Enter a name for the filter.
4. Select the sorting method (ascending or descending).
5. Choose the search criteria and select Save as Project filter.
6. Select Save.

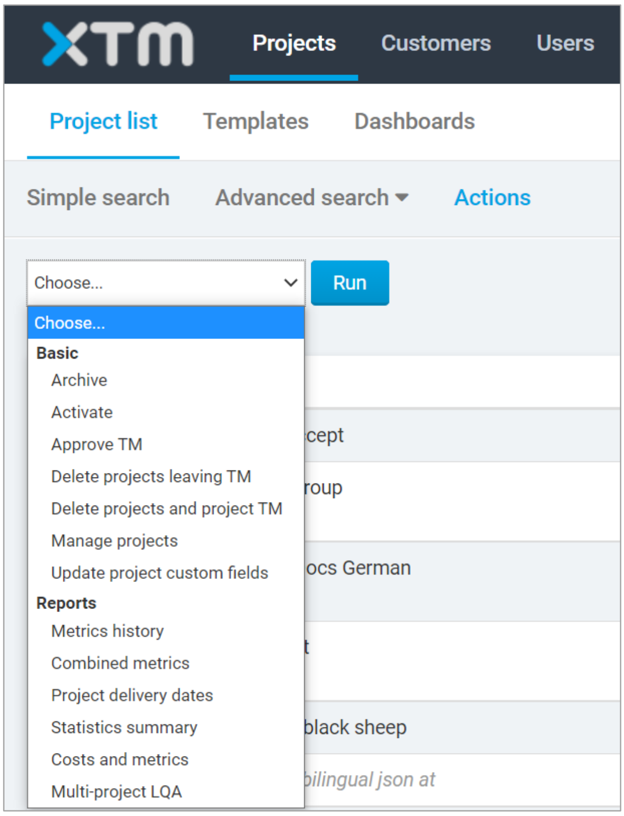
Private filters are distinguishable by the user icon. To change a filter name or delete it, select the icon by the name of the filter.



Smart filters

Actions for Projects

On the Actions tab you can carry out a number of actions on multiple projects simultaneously. Select the desired projects by selecting the box in the left-hand column. Then select the action from the dropdown list and select Run. The available actions are:



Available project actions

Archiving projects

Archiving and zipping projects

Zipping and archiving finished projects are important house-keeping tasks that ensure good backup speed, disk access speed, browser speed, database speed, and server maintenance.

There are two ways of placing projects in the XTM archive system:

- Automatic, also called auto-zipping or auto-archiving
- Manual.

Automatic zipping

Automatic zipping is a process that XTM performs daily (**auto-archiving**). It zips all the files in certain projects and marks them as “Auto zipped”. An Auto zipped project remains on the Project list under the Current tab, but it is italicized, and the project menu icon ☰ is grey.

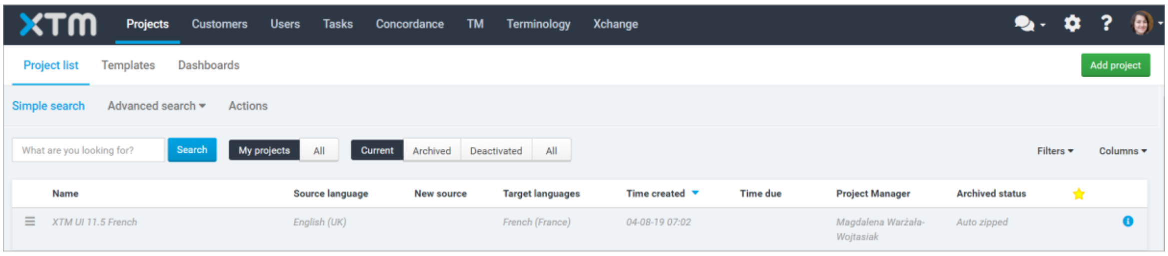
All auto-zipped projects can also be manually archived from the project menu.

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

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

The term “used” means that the project has not been opened in XTM Workbench or Project Editor or no “action” on the Action tab has been taken on the project.

You can customize these time ranges. Contact XTM Support Team: support@xtm.cloud.



Auto-archived project

Note: Auto-archived projects are locked, and you cannot perform any action on them.

Manual archiving

Manual archiving is a process that can be performed by XTM users. All the files included in a project are zipped while the project is marked as Archived and moved from the Current to the Archived tab in the Project list view.

To archive a single project

1. Select the project menu icon ☰ from the project list.
2. Select Actions > Archive project.

To batch archive projects

1. In the project list, go to Actions.
2. Select the checkbox for the projects you want to archive
3. From the dropdown select Archive.
4. Select Run.

Note: Archived projects are locked. You cannot perform any action on them!

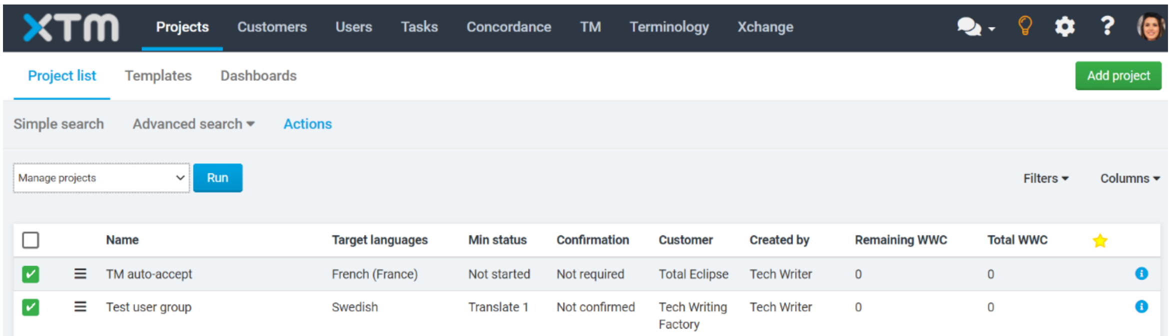
Activating auto-zipped and archived projects

Auto-zipped or archived projects can be easily activated should you wish to access the files again. You can activate one project at a time or several projects in one go.

To activate individual projects

1. Select the project menu icon ☰ from the project list.
2. Select Actions > Activate project.

For batch project activation, go to the Actions tab.



Actions tab – activating many projects in one go

Approve TM

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

Delete projects with or without TM

Delete the selected projects while deciding if you want to keep the TM generated in the project.

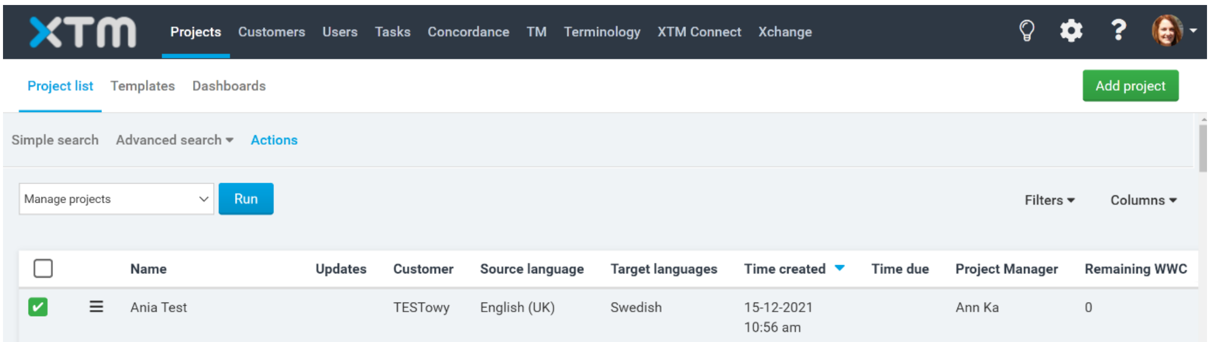
Manage projects

How to access the Manage projects popup

1. On the project list, go to the Actions tab.
2. Select one or more projects by selecting the checkbox(es) in the left-hand column.
3. Choose Manage projects from the dropdown list and select Run.

The Manage projects popup contains three tabs:

1. General
    a. Due dates
        - set the Delivery due date
        - set the Workflow start date
        - set the Workflow finish date
        - overwrite existing due dates
    b. Project manager: Assign Project Manager
    c. Language statuses: all target languages listed with the status Finished or Not finished
2. Manage workflow of one or more projects.
3. Assign linguist manage linguist assignment for specified steps for one or more projects at once and start and finish the workflows.



Manage projects tab in Project list > Actions

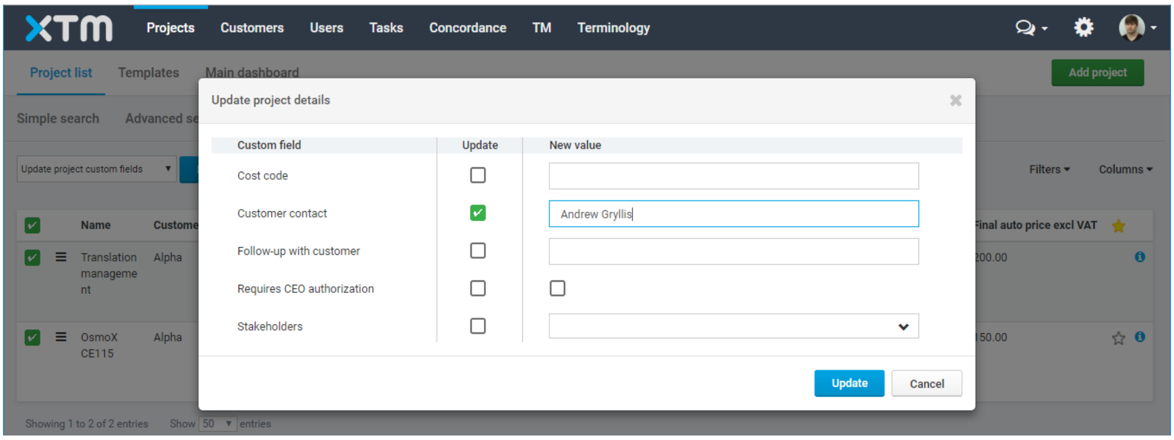
Update project custom fields

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

How to update custom fields for multiple projects

1. Select the required projects from the Projects list.
2. Go to Actions > Update project custom fields > Run.
3. Select the Update checkbox for the required custom fields.
4. Select the Update button.

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



Projects > Project list > Update project details

Visibility of updated project custom fields to LSPs

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

Subcontractors will only see values of the custom fields that were updated, provided that both the custom field names, type and selection options exactly match those of the contractor that requested the changes. Other custom fields will look blank to subcontractors. When a custom field is updated by a contractor but it does not exist in the subcontractor's XTM account, it will not be changed.

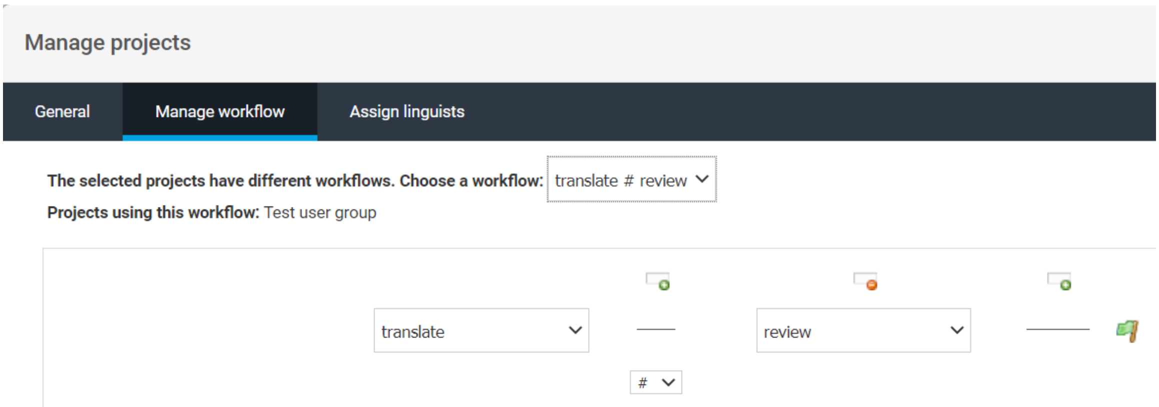
Subcontractors can modify values of updated custom fields. When it happens, the new values are changed only on the subcontractor's side. If the contractor updates custom fields again, the custom fields modified by the subcontractor will be overwritten and updated again. If you do not want subcontractors to see the updated values of the custom fields, you can update custom fields for each project individually using the Project Editor.

Multi-level LSP language delivery chain

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

How to change the workflow

The Manage workflow tab in the Manage projects popup allows you to edit the workflow for all selected projects at once. Change the workflow as required and select the Update button.



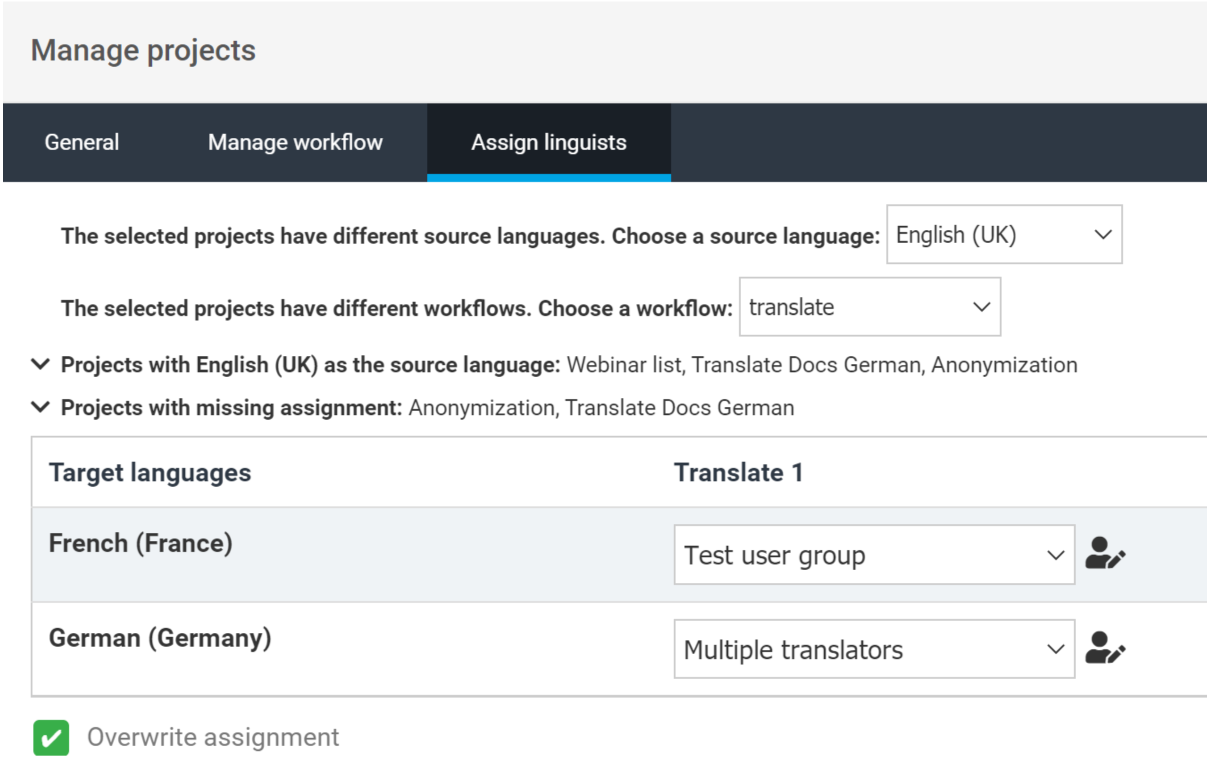
The manage workflow tab in the Manage projects popup

How to assign linguists to projects

1. Go to Project > Actions > Manage projects.
2. Select the project(s) > Run.
3. In the popup, go to the Assign linguists tab. Select a linguist for each workflow step.
4. *Optional*: Select the Overwrite assignment checkbox.
5. Select Start.

Projects with missing assignments:

If no linguists were assignment to a project a list of those projects is shown in the Manage workflow > Assign linguists tab.



Starting workflows:

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

Closing workflows:

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

Populating time entries in the workflow with several multi-language files

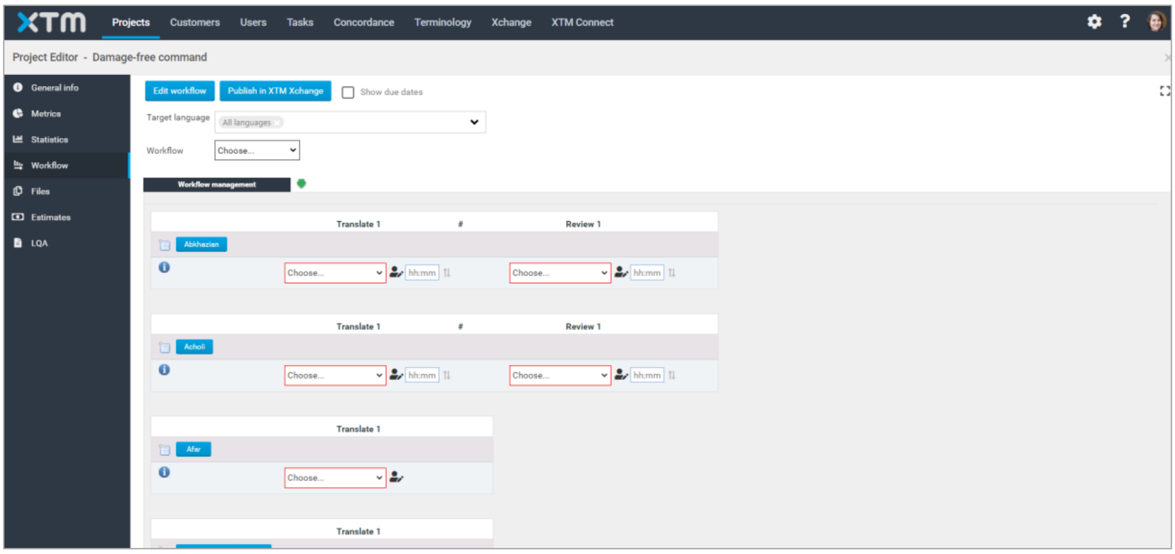
Before you start: This option requires you to enable manual time tracking in Settings (see here).

If multiple languages have different workflows assigned, then the files for each language have the same workflow inherited from the language level. This means that:

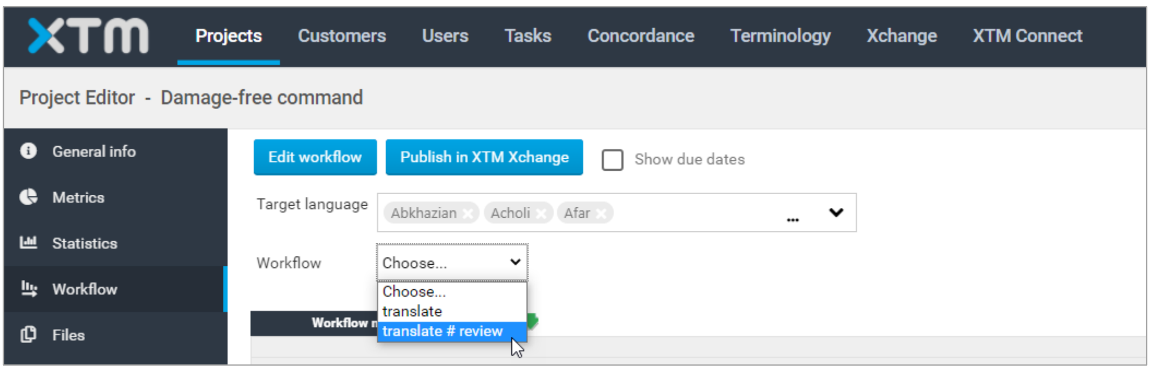
- it is possible to define the time entry from within the main workflow editor view, without selecting the workflow definition from the dropdown.
- It is possible to edit or populate time entries across languages only if you select the workflow definition from the dropdown first.

To populate time entries:

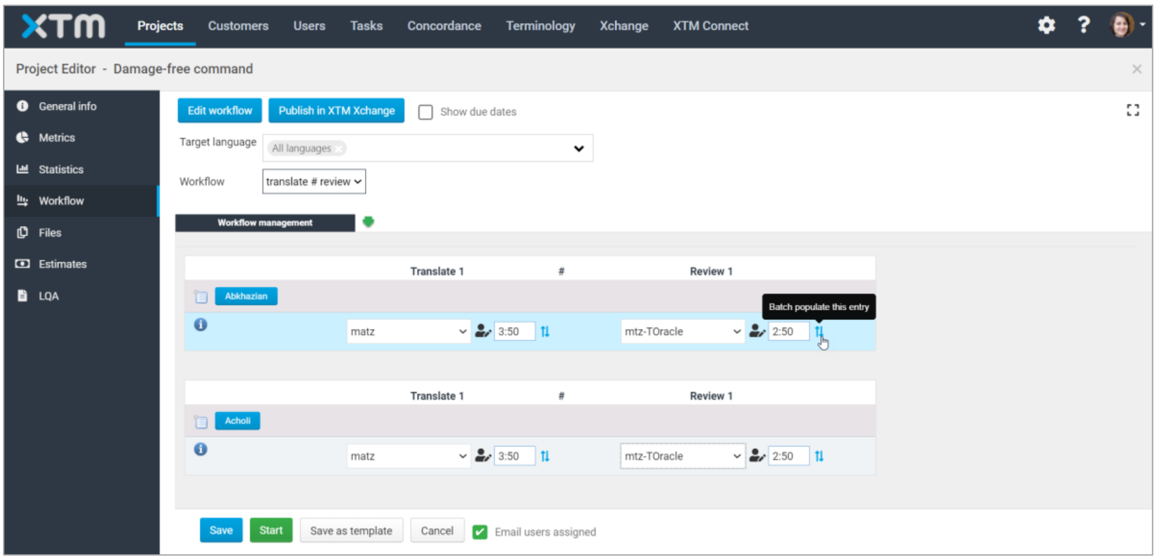
1) In the Workflow Editor, view all target languages, e.g. the Target language dropdown is set to All languages. The time entry boxes are active, and you can enter any value manually, but the arrow icons are disabled. This means that bulk population of the time is not possible.
2) To activate the option, in the Workflow dropdown, choose the workflow you wish to assign time to in the Workflow dropdown.
3) The arrows turn blue and any time is entered into the boxes can be populated into the same steps for different languages.
4) If groups or files in a given language pair have different workflows assigned, a warning pops up that it is impossible to make any modifications due to different settings.



All target languages view with greyed out bulk propagation of time



Selecting the workflow to activate the option

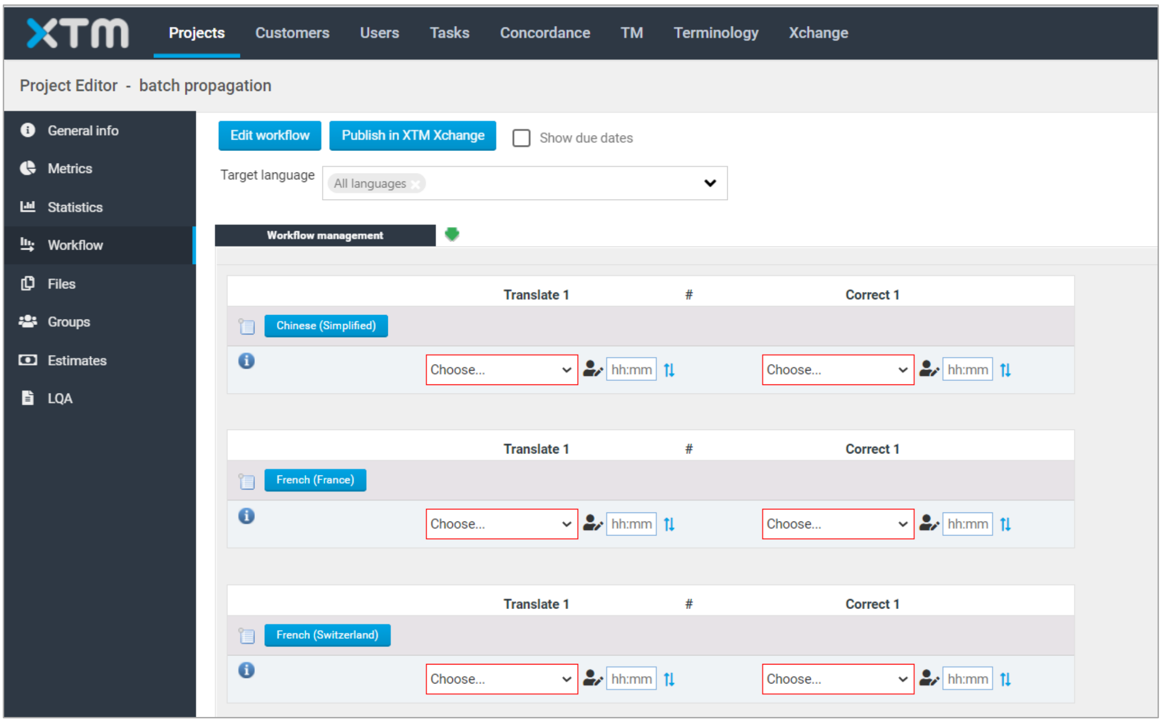


The batch populate option available for a given language and workflow

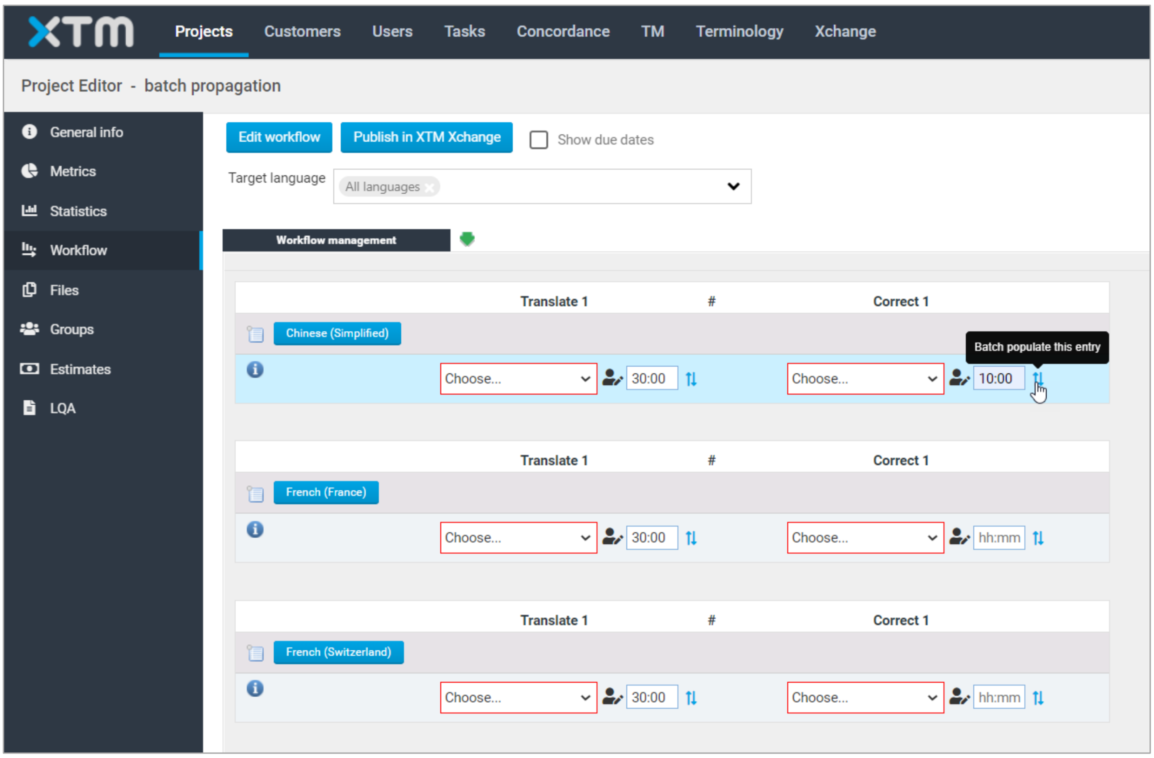
Populating time entries in the workflow with groups of files or bundles

Before you start: The option to group files depends on the configuration under Settings > Projects > Project views (see more: here).

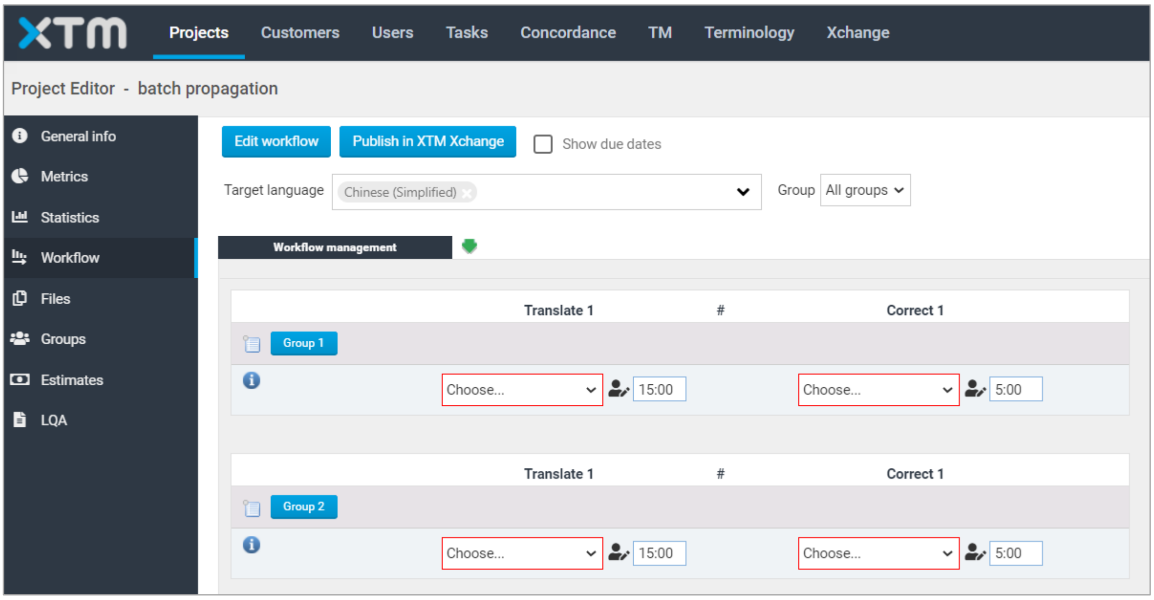
On the levels of groups of files and bundles, time will be divided equally to the number of items. If there are any seconds left, the time will be rounded to minutes. If you change the time at file or bundle/group level after it was inherited as part of auto-population, the time at the language level is not recalculated and the "-" sign in the time box appears.



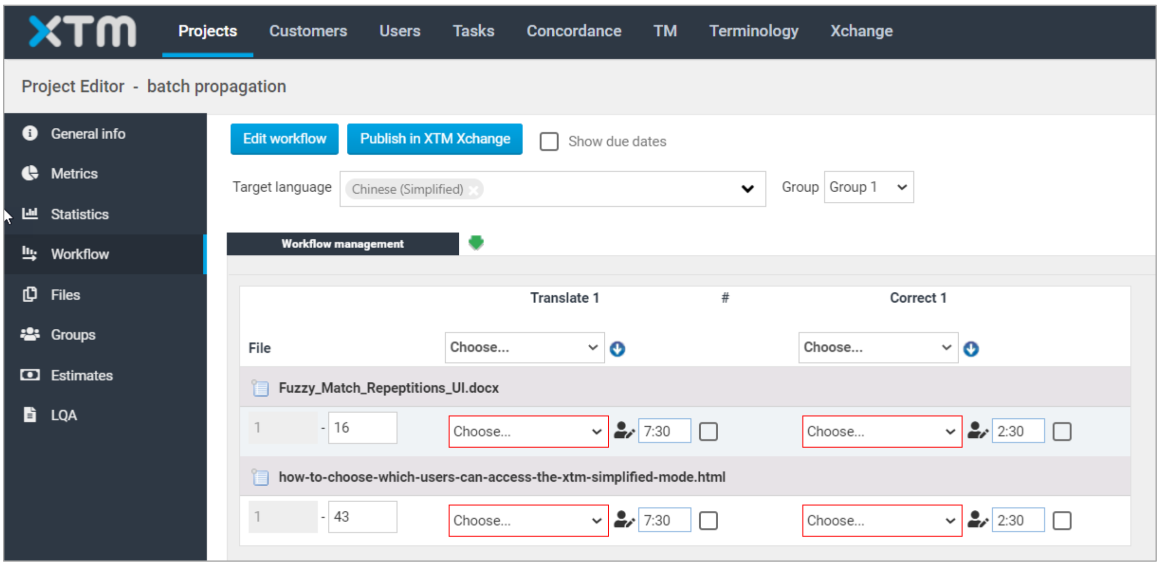
All languages view



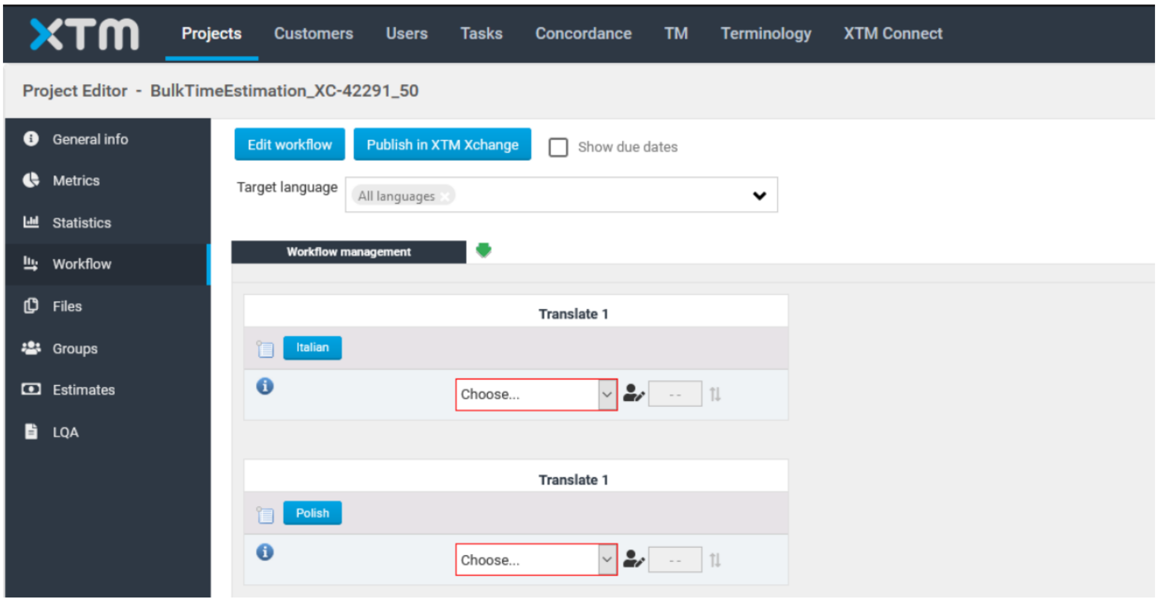
Populating the time for all target languages



All Groups view – files to be translated into the same target language, but assigned to different groups



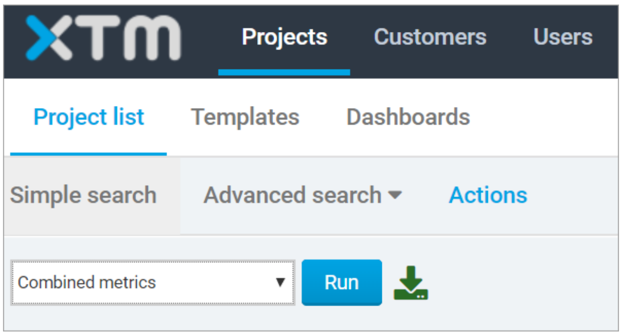
All Groups view – files to be translated into the same target language assigned to the same group



The grey-out time box when time has been changed after auto-propagation

Reports

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



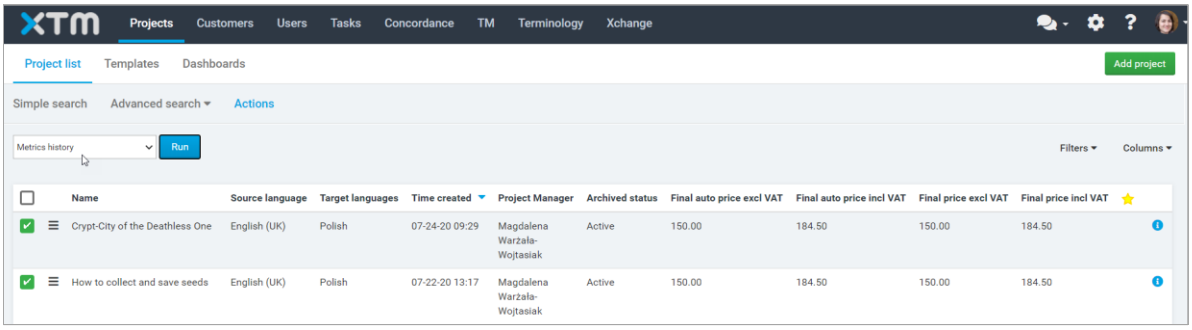
Generating reports

Metrics history

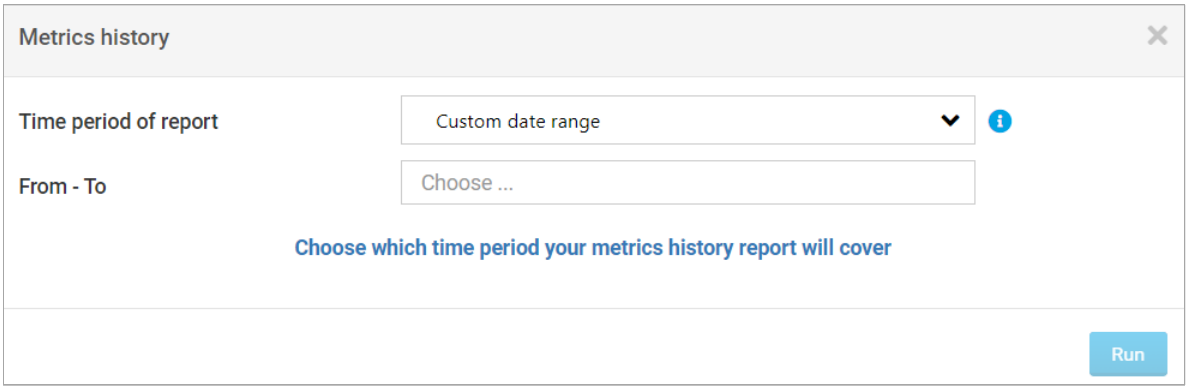
Selecting this option generates an Excel file report summarizing the history of metrics of all the selected projects in all target languages. One sheet is generated per every history, with dates and times of saving the history. You will be prompted to choose a period the requested report should cover:

- whole duration of the project
- custom date range, in which case you will have to specify the exact “From – To” dates.

Note: Each event of Metrics generation is presented in a separate Excel worksheet. Excel does not limit the number of worksheets per file, but you might not be able to open large files if you do not have enough memory on your PC.



Metrics history selected under the Actions tab



Metrics history – custom date range

1	**Project**	XTM UI 12.3	**Target language**	All	**Date**	20-02-2020 10:45	
2	**Initial**	**Segments**	**Words**	**Word %**	**Characters**	**Characters %**	**Characters excluding spaces**
3	Total count	20796	78353	100	478648	100	420276
4	Non-translatable (The option set non-translatables as done is set to on. First step only)	17	15	0	334	0	334
5	**Translation memory matching**						
6	ICE match	14539	64539	82	391072	82	340339
7	Leveraged match (The option set 100 matches as done is set to on. First step only)	5991	12095	15	77129	16	70974
8	95-99 Fuzzy match	20	179	0	1118	0	954
9	85-94 Fuzzy match	40	474	1	2838	1	2397
10	75-84 Fuzzy match	48	343	0	2049	0	1749
11	Machine translation	0	0	0	0	0	0
12	**Internal matching**						
13	Repeat	29	186	0	1034	0	875
14	95-99 Fuzzy repeat	1	2	0	14	0	13
15	85-94 Fuzzy repeat	0	0	0	0	0	0
16	75-84 Fuzzy repeat	7	33	0	196	0	170
17	No matching	104	487	1	2864	1	2471
18	**Progress - translate1**						
19	Done	20547	76649	98	468535	98	411647
20	To be done	249	1704	2	10113	2	8629
21	To be corrected	0	0	0	0	0	0
22							
23	**File**	bundle-en_GB/analysis-manager-web/en_GB.xml	**Target language**	Polish	**Date**	20-02-2020 10:45	
24	**Initial**	**Segments**	**Words**	**Word %**	**Characters**	**Characters %**	**Characters excluding spaces**
25	Total count	1026	5564	100	33898	100	29321
26	Non-translatable (The option set non-translatables as done is set to on. First step only)	0	0	0	0	0	0
27	**Translation memory matching**						
28	ICE match	1008	5444	98	33175	98	28703
29	Leveraged match (The option set 100 matches as done is set to on. First step only)	11	27	0	196	1	180
30	95-99 Fuzzy match	0	0	0	0	0	0
31	85-94 Fuzzy match	3	75	1	425	1	350
32	75-84 Fuzzy match	2	9	0	51	0	44
33	Machine translation	0	0	0	0	0	0

2020-02-20 09.45.28 | 2020-02-21 11.06.44 | 2020-02-21 23.46.49

Metrics history – generated report for a project with many target languages

Combined metrics

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

1	**Project**	Warning, Emily Dickinson			**Date**	04-15-20 09:57	
2	**Initial**	**Segments**	**Words**	**Word %**	**Characters**	**Characters %**	**Characters excluding spaces**
3	Total count	104	1126	100	6166	100	5210
4	Non-translatable	0	0	0	0	0	0
5	**Translation memory matching**						
6	ICE match	0	0	0	0	0	0
7	Leveraged match	0	0	0	0	0	0
8	95-99 Fuzzy match	0	0	0	0	0	0
9	85-94 Fuzzy match	0	0	0	0	0	0
10	75-84 Fuzzy match	0	0	0	0	0	0
11	Machine translation	12	68	6	380	6	322
12	**Internal matching**						
13	Repeat	0	0	0	0	0	0
14	95-99 Fuzzy repeat	4	8	1	50	1	46
15	85-94 Fuzzy repeat	0	0	0	0	0	0
16	75-84 Fuzzy repeat	2	6	1	38	1	34
17	No matching	86	1044	93	5698	92	4808
18	**Progress - translate1**						
19	Done	3	20	2	106	2	88
20	To be done	101	1106	98	6060	98	5122
21	To be corrected	0	0	0	0	0	0

A typical combined metrics report

Project delivery dates

Project delivery dates report can be generated in two formats: standard and aggregated.

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

	A	B	C	D	E	F	G	H	I	J	K	L
1	Id	Name	Customer	Source Language	Created	Due Date	Finished	Target Language	File	Step1	Step2	Step3
2	173152	Dell laptops 2	Ponders	es_ES	12-06-2014 16:39		not finished			translate1		
3								en_GB		translate1		
4									Por que utilizar portatiles de Dell - ES 3.docx	translate1 due:12-06-2014 14:00 finished:12-06-2014 14:39	correct1 due:12-06-2014 18:00 finished:12-06-2014 17:39	review1 due:13-06-2014 10:00 finished:-

The project delivery dates report – All – standard

The aggregated project delivery report is slightly modified but contains the same data as the standard one.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Id	Name	Customer	rce Langu	Created	Due Date	Project Status	Target Language	File	Finished	Step Number	Step Name	Step Due	Step Completed
2	4108	inline	TestCusto	en_GB	13-05-2019 13:39		27-05-2019 14:35	pl_PL	XTM Conn	27-05-2019 14	1	translate1	27-05-2019 00:0	27-05-2019 14:35
3	4108	inline	TestCusto	en_GB	13-05-2019 13:39		27-05-2019 14:35	pl_PL	XTM Conn	27-05-2019 14	2	review1	27-05-2019 00:0	27-05-2019 14:35

The project delivery dates report – All – aggregated

Statistics summary

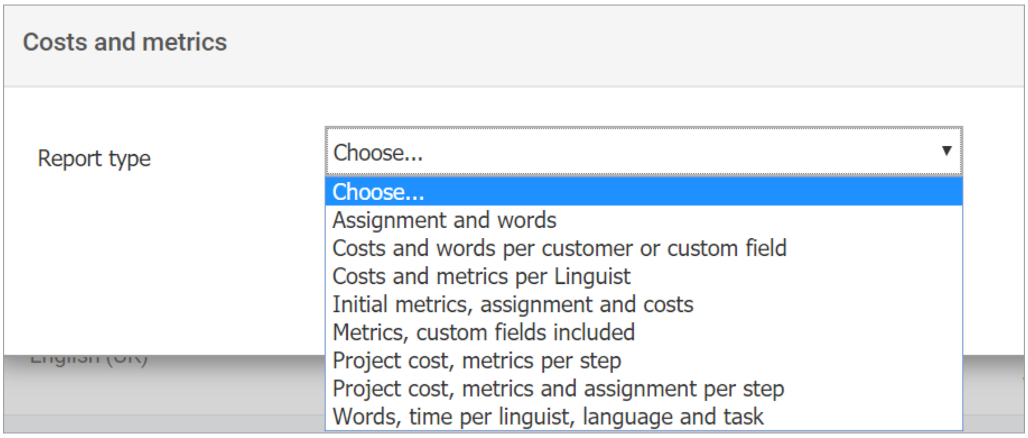
This report includes the following fields:

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

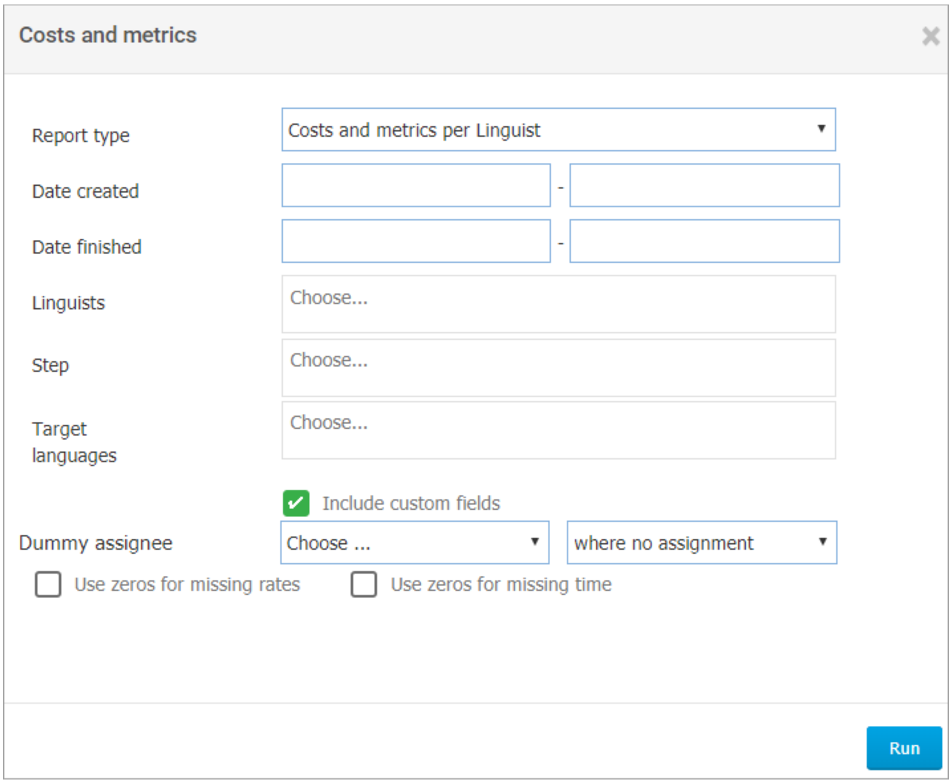
Costs and metrics

You can generate the following types of Cost and metrics reports:

- Assignment and word
- Costs and words per customer or custom field
- Costs and metrics per linguist
- Initial metrics, assignment and costs
- Metrics, custom fields included
- Project cost, metrics per step
- Project cost, metrics and assignment per step
- Words, time per linguist, language and task

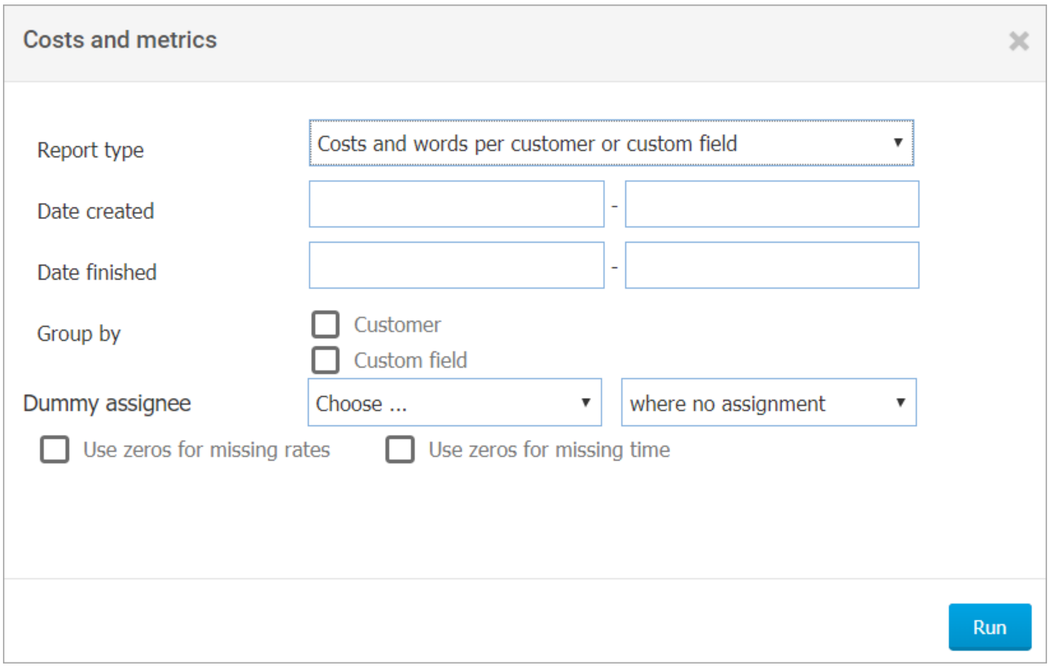


Available type of Cost and metrics report



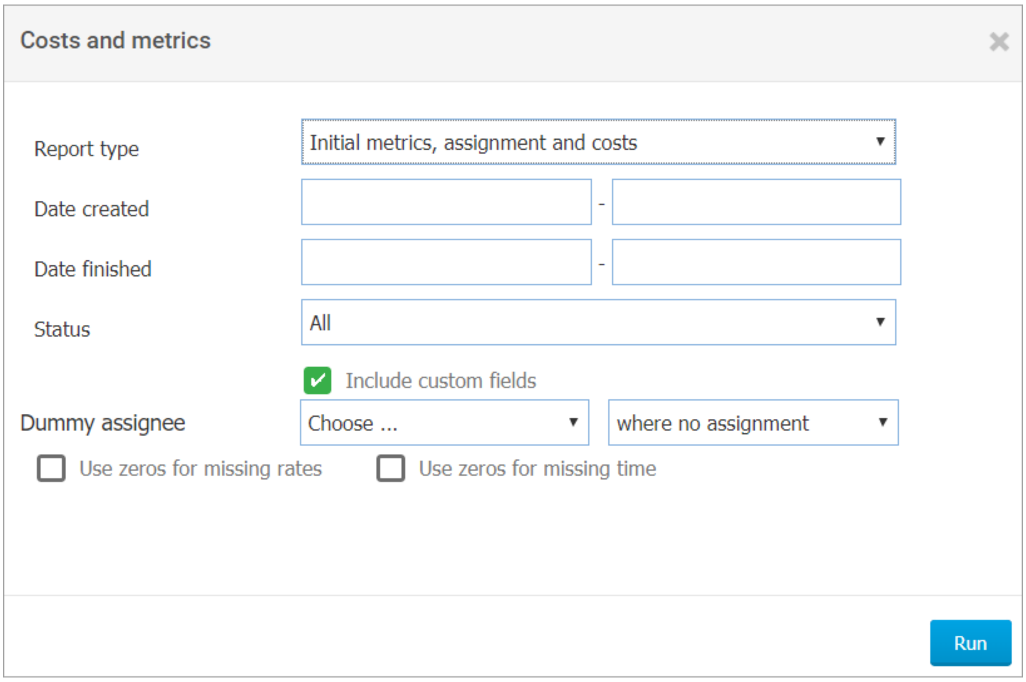
The report of Costs and metrics per Linguist

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



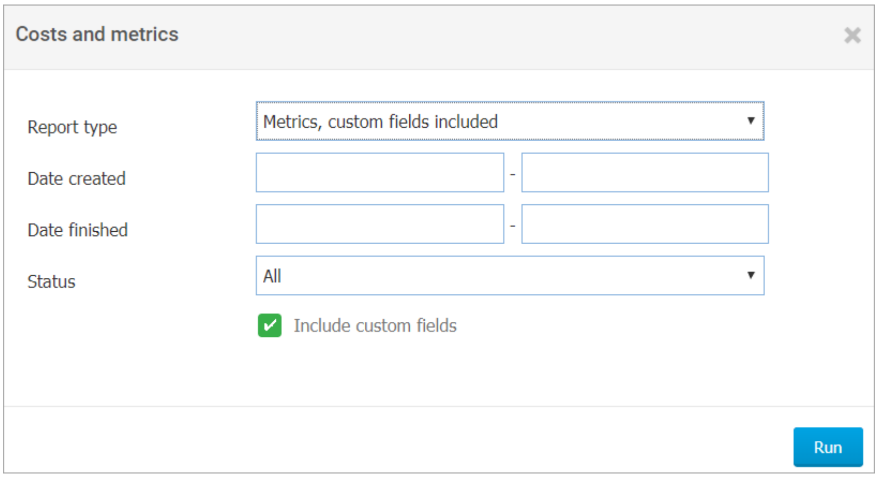
The report of Costs and words per customer or custom field

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

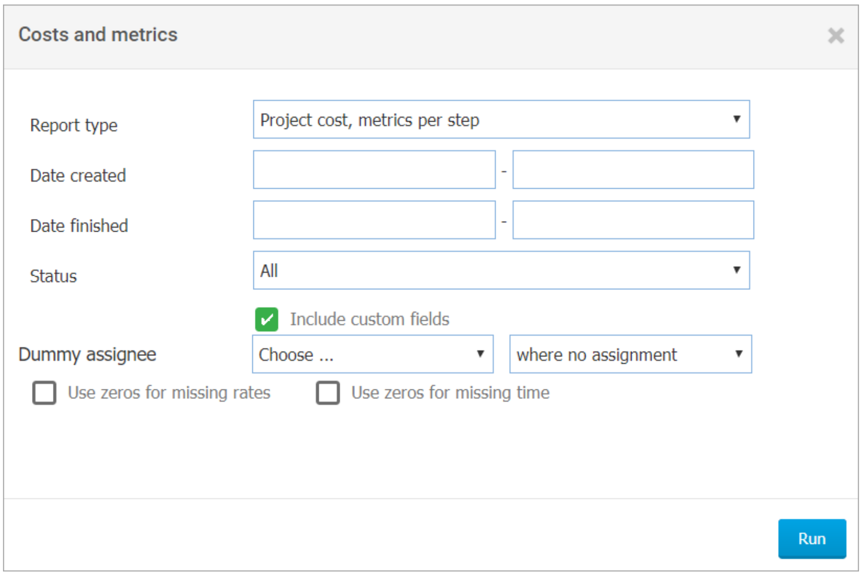


The report of Initial metrics, assignment and costs

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

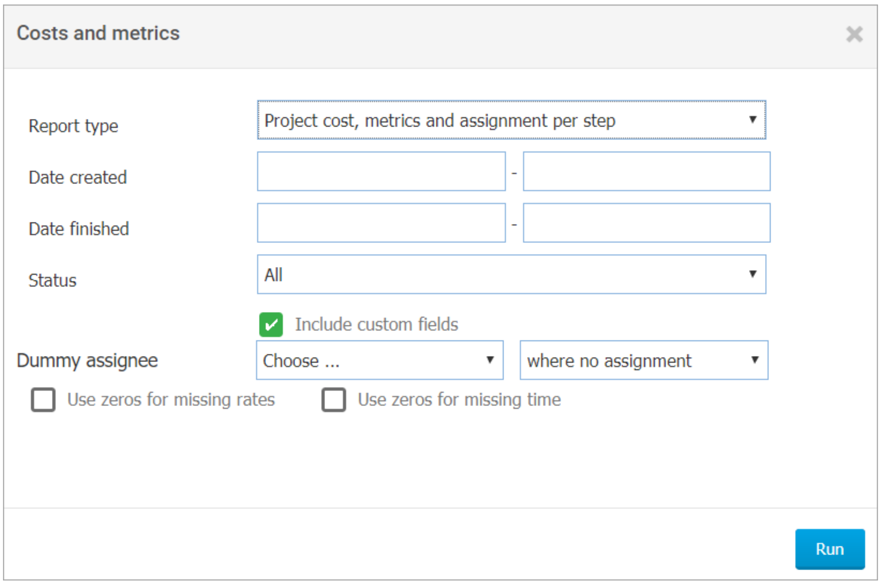


The report of Metrics, custom fields included



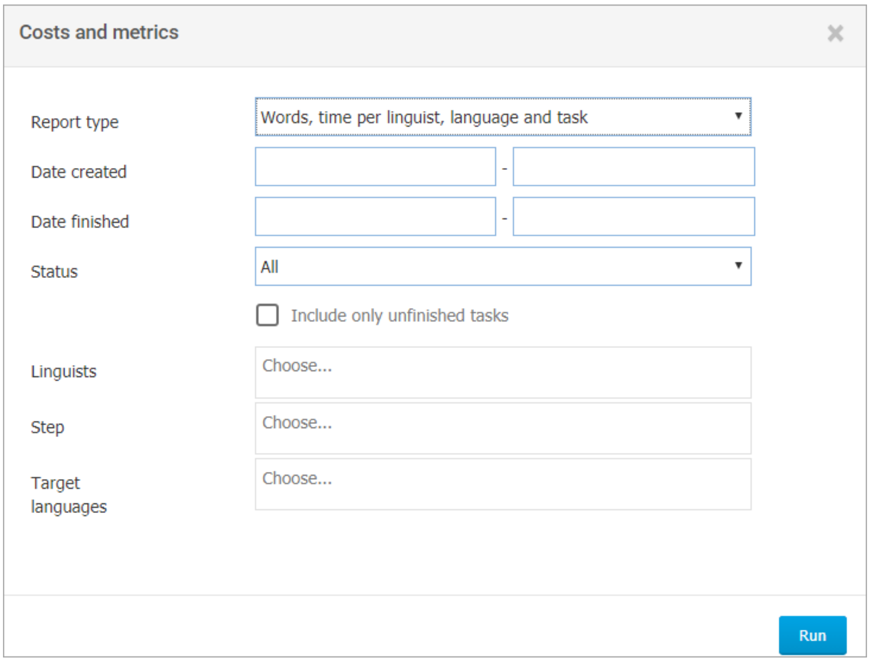
The report of Project cost, metrics per step

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



The report of Project cost, metrics and assignment per step

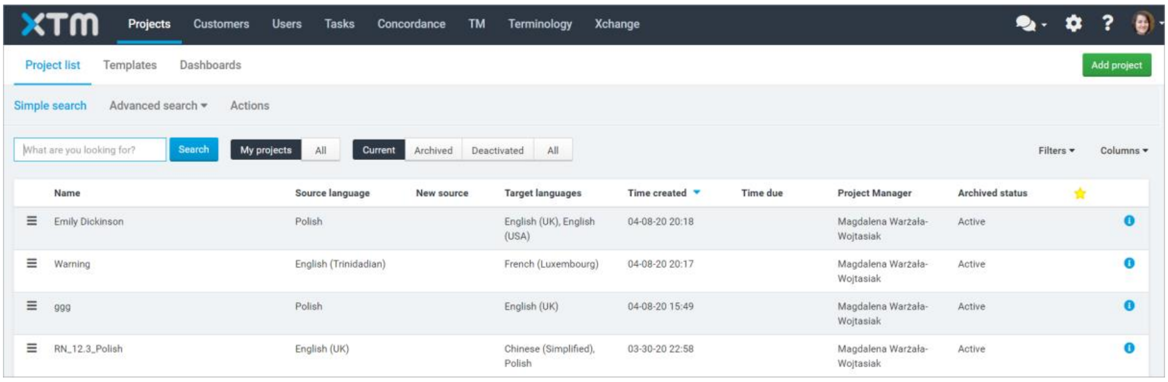
This report is similar to the report of Project cost, metrics per step but it also includes information about the assignee.



The report of Words, time per linguist, language, and task

Reviewing Projects

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



Project list

Hover over the info icon in the right-hand column to display additional information about the project. The contents depend on the configuration and are customizable.

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

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

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

Then for the project in the general tab, you can:

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

The actions that you can take are:

- Delete the project with any TM that you generated with the project.
- Delete the project leaving the TM in place.
- Approve the TM even if the project has not been completed.
- Archive the project. This removes it from the current list of projects, but it may be restored at a later date.
- Reanalyse the project – the option recalculates the matching and metrics, but leaves the statistics and workflow allocations unchanged; deletes target segment comments added in XTM Workbench; deletes from History any generated offline files
- Reopen the project
- Finish the project
- Accept leveraged & ICE segments – This turns their status from orange to green and any green segments are saved in the TM database as approved TM
- Save the settings from this project as a template for use in future projects.
- Report a problem you are experiencing with the project. Selecting this option brings up a window to enter details about the problem. XTM sends this message to the XTM support team together will all the relevant information about the project to ensure a swift resolution.
- Publish the project in XTM Xchange – See Chapter 8 for more details about XTM Xchange.

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

- Extracted terms: A list of candidate terms that was automatically extracted from the source file during analysis. The column headers for the terms report are:
  - Source language
  - Surface Forms – this is the form in which the term appears in the source text.
  - Frequency – the number of times the term appears in the source text
  - Remarks
  - Context – the context in which the term appears in the source text
  - Target language – this is intentionally left blank so that a translator can insert the translation of the term before the terms are imported into the term manager.
- A project history showing the time when any action was taken on the project and who took the action. The column headers in the report are:
  - Date [in Western European Time, WET]
  - User ID
  - User name
  - LSP ID – used if the project was subcontracted
  - LSP name – used if the project was subcontracted
  - Job ID
  - Project ID
  - Project name
  - Target language
  - File name
  - Action name
  - Additional information
- Project delivery dates - a summary of when each step in the workflow was finished for each file in the project and how this compares to the due dates. The column headers in the report are:
  - ID –project ID
  - Name –project name
  - Customer
  - Source Language
  - Created – the date and time the project was created
  - Due Date - the date and time the project was due
  - Finished - the date and time the project was finished and if the project is not finished it will say “not finished”. Overdue items are shown in red.
  - Target Language – The target languages can be expanded or collapsed using the little + in the left-hand column of the spreadsheet
  - File – The files for each target languages can be expanded or collapsed using the little + in the left-hand column of the spreadsheet
  - Step1, 2, 3 etc. For each step in the workflow and for each target language the report shows the due date time and the finished date time. Overdue items are shown in red.
- The LQA report. For a detailed explanation of the LQA process and report see the LQA section in this manual

XTM Messenger

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

Nickname and avatar

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

Chat configuration

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

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

XTM Messenger – Open chat for linguists

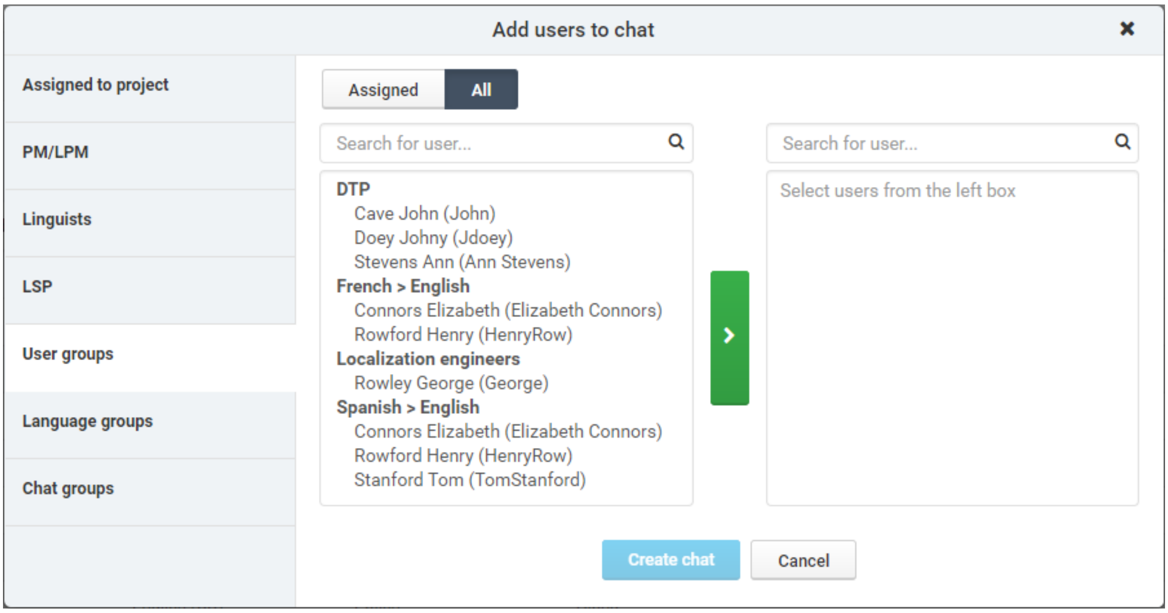
Opening a chat in XTM Messenger

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

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

Choosing chat participants

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



Choosing chat participants

Chat window

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

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

Sending files using chat

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

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

Unread messages

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

Dashboards

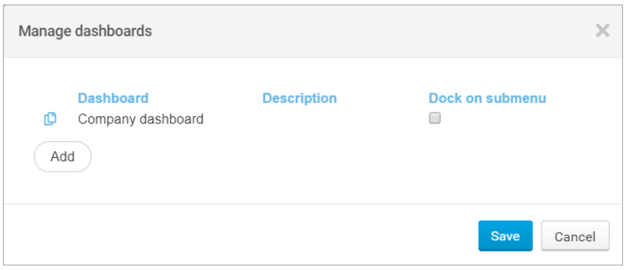
Dashboard Overview

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

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

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

The copy icon displays the popup window below where you can, add, dock, load, edit or delete a dashboard by selecting the menu icon.



Manage Dashboards window

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

Refreshes the data on the widget

Displays the configuration settings for the widget

Deletes the widget

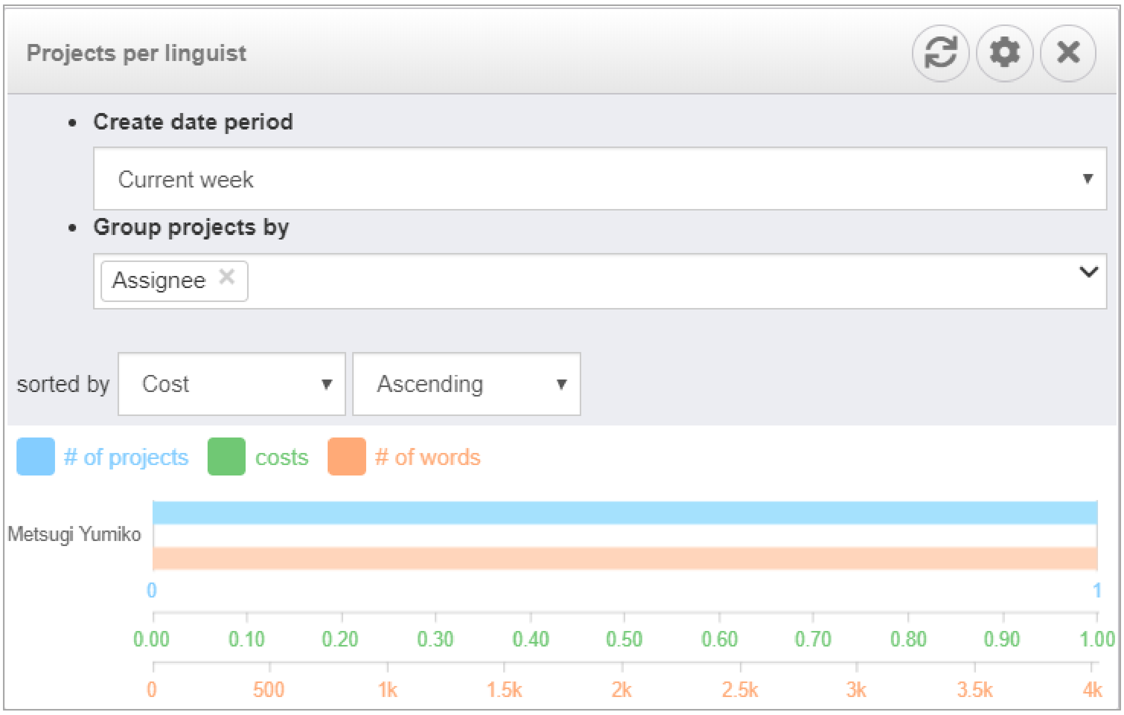
Widget Settings

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

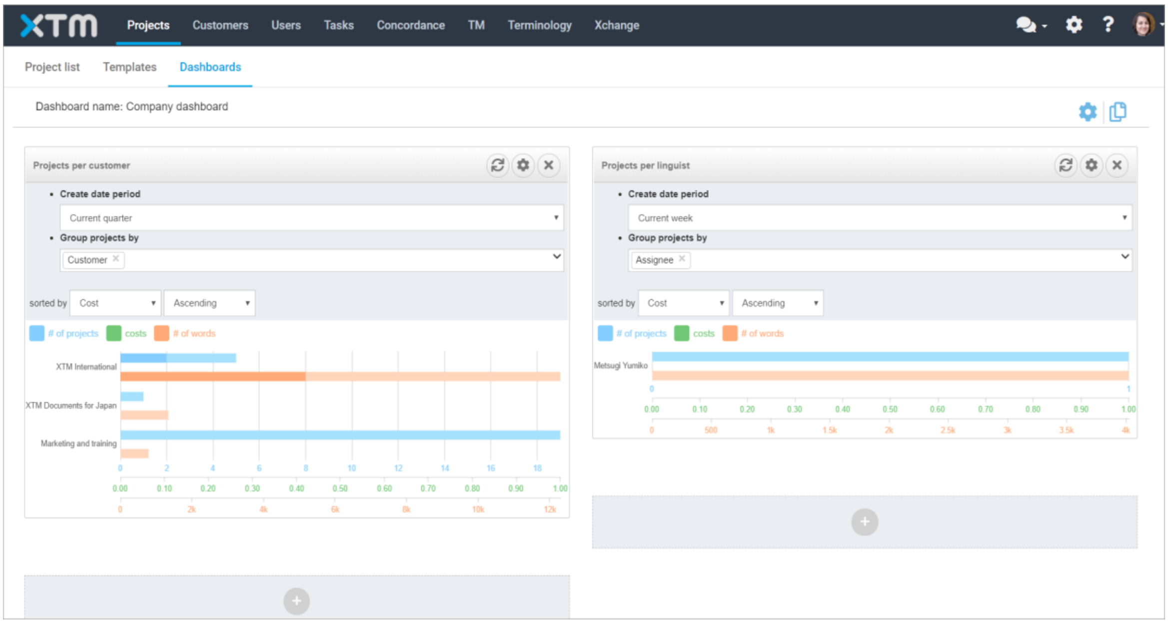
- Filter projects: This field allows you to select which projects are used to prepare the data
- Group projects by: Set this parameter for determining the y axis of the graph
- Sort results by: the field entered here determines how the groups are sorted. You can choose if the values are sorted with the values ascending or descending.
- Number of groups to display. This parameter sets the number of groups on the graph. By default, this value is set to 10. Groups with a null value are not displayed.

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

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



Configuring a widget

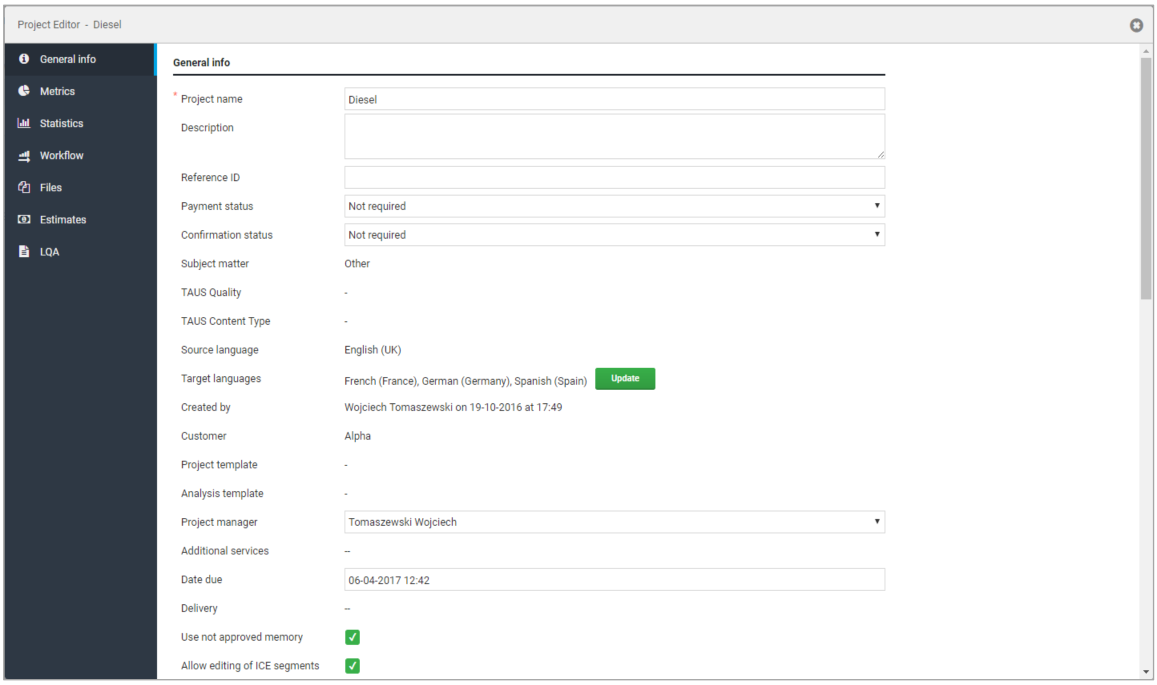


Typical Dashboards

Project Editor

When you select a project from a Project list, you can access Project Editor with the project details. Project Editor contains several sections:

- General info
- Metrics
- Statistics
- Workflow
- Files
- Estimates
- LQA



Project editor – General info

Project Editor - General info

This tab provides ability to view and edit settings relating to the project.

The General info section contains subsections (some must be enabled by the system administrator):

- General info
- Machine translation
- Custom fields
- File upload/download by linguists
- Reference material
- Video preview
- Preview files
- Segment ID images

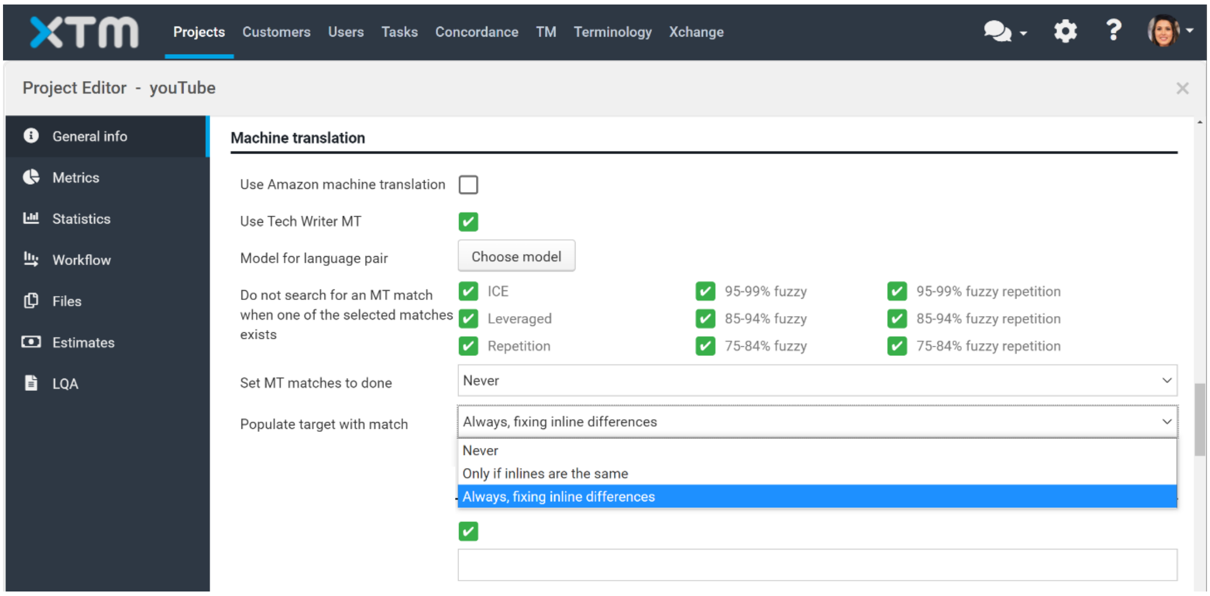
General info

In the Project Editor General info, you can change:

- Project name
- Description
- Reference ID
- Payment status
- Proposal approval status
- Filter template
- Project Manager
- Workflow start date
- Workflow due date
- Auto-calculate due dates for workflow steps
- Use not approved memory
- Allow editing of ICE segment
- TM language variant penalty profile
- Highlight segments populated with a language variant match
- Mark segments as locked
- Use the selected customer's Terminology
- Use the selected customer's Terminology andTM
- Select customers
- Monitor target length
- TM penalty profile
- Term penalty profile
- QA Profile
- Segment filter profile
- Enable linguist to turn the profile off
- Set tags for TM and terminology
- Set tags for TM and terminology separately
- Set tags for TM & terms

Machine translation

Select one of the default machine translation engines.
Users who requested a custom machine translation engine can select it here.
You can enable populating the target language segments with matches using machine translation.



Populating target segments with machine translation matches

Custom fields

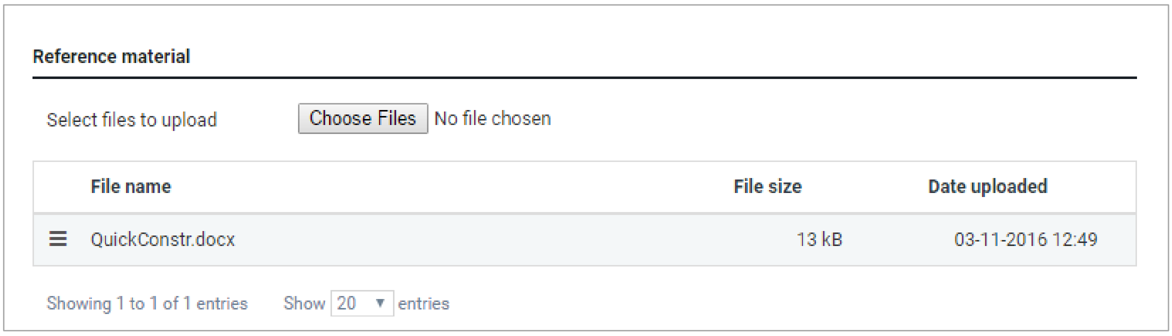
Select custom fields enabled by the XTM administrator.

File upload/download by linguists

Select which file formats linguists can download or upload.

Reference material

In the general window section, you can view and update the reference material. The menu icon in the left-hand column allows you to download or delete the reference material.



The Reference Material section in the Project Editor

Video preview section in the Project Editor

Video preview allows linguists to see subtitles in-context. To use Video preview, make sure to use the supported file format as the source file.

Supported file formats include:
SRT

Adding video preview files

1. Select a required file type from the dropdown.
2. Add a link. We support links from sites such as:
    - YouTube
    - Vimeo
    - other public sites (the URL must be public)
3. Select Save.
   Once the subtitles file and the relevant link have been added, linguists can access Video preview from XTM Workbench.

Preview files

Add preview files. Supported file formats include:

- PNG
- JPG
- SVG

Segment ID images

You can upload images related to segments so that linguists can view them in XTM Workbench. The functionality is based on Segment ID and you have to configure Segment ID generation rules on your account. Uploaded images must have names corresponding to generated Segment IDs.

Project Editor - Metrics

The Metrics tab shows the metrics for each language in the project. The metrics are updated in real-time and show the progress of the job through translation, correction, and review.
You can download the metrics as:

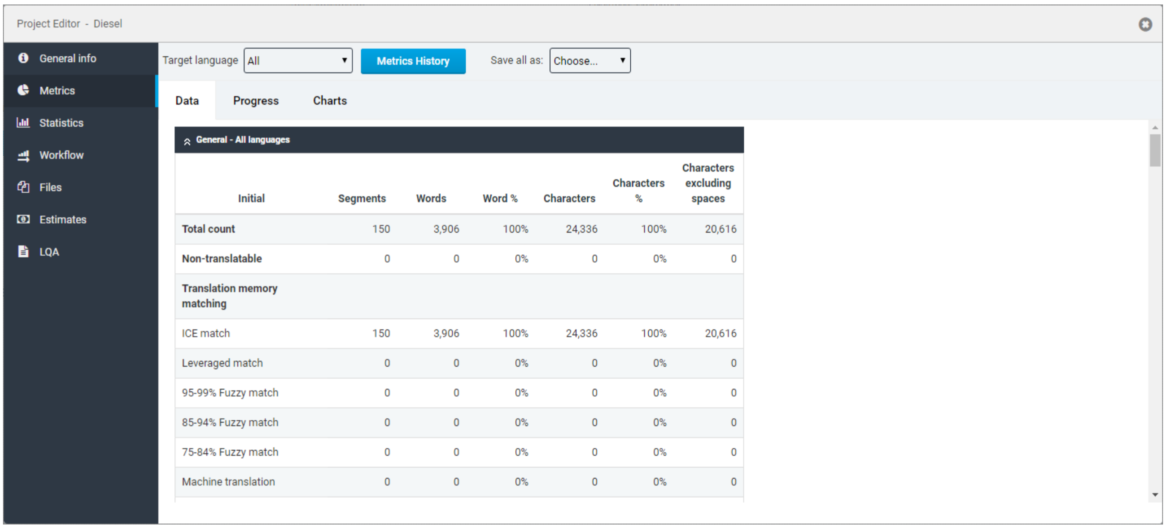
- CSV
- XLS

Select the relevant button at the bottom of the window.

Character-based languages:

The number of “words” is estimated by dividing the number of characters by a factor. These factors are set on the Configuration > Settings > Translation > Metrics.

The number of characters in each segment is divided by the relevant factor. It is then rounded up to the nearest integer to give the number of words in the segment. The number of words in each segment is summed up to give the total word count in the document.



A typical metrics window

The machine translation category in metrics

Shows how many segments, words and characters have been translated by MT. You need to have one or more of the MT integrations activated for this to show results. By default, all the figures are set to zero.

Most types of MT that can be used with XTM (excluding Asia Online)

We send the unmatched segments one by one during translation. Therefore, the figures for machine translation in metrics are quickly updated as the linguists do their work.

For Asia Online users

If you use Asia Online MT, the text without TM matches or repetitions are sent to be matched during analysis. Thus, the figures become visible after project creation.

Project Editor - Statistics

The statistics tab provides information about the quantity of translation completed by each linguist for both the source and target in a project. The data is presented for each linguist, workflow step and file and when there are multiple files in a project as a total for each linguist per workflow step. You can download the statistics data as:

- CSV
- XLS

The source and target statistics are updated automatically when a segment status is set to done.

Before a project is updated by uploading a new or modified source file the statistics will be saved to the Statistics History. Selecting the Statistics history button opens a new window where you can access the selected historic statistic files by selecting on the relevant line.

Generate Aggregated PO

Project managers can generate a single PO file including costs from all projects for a specific linguist based on user statistics.
A set of PO reports is generated for each linguist with the cost for the work done in each project for a given time range.

> **Note:** This feature is hidden by default and needs to be enabled by contacting XTM Support at support@xtm.cloud.

How statistics are stored in the database in XTM Cloud

The statistics reflect the actual work done by the linguists in each project. In XTM Cloud, the statistics are divided into the statistics source and statistics target.
The statistics are saved when:

- a segment is modified
- the status of a segment is changed

XTM collects information about the statistics of all linguists who have worked on a given project. A particular linguist doesn't need to be assigned to the workflow during the aggregated PO generation. Even if another user was assigned to the same task and continued the translation, the costs will be generated for both.

> **Note**: You cannot apply the Use zeros for missing rates option or use Dummy assignee during Aggregated PO generation.

How to generate Aggregated PO in XTM Cloud

1. Go to the Projects > POs tab.
2. Select the Generate Aggregated PO button.

Aggregated PO generation consists of generating costs based on statistics (default: statistics target) for all linguists who have performed any translation since the last Aggregated PO generation.

Earlier date limit of Aggregated PO

If no Aggregated PO has been generated before, the earlier date limit is the creation of the first record in the statistics_segment of the database table.

Maximum date range

The maximum date range for the first generation is 180 days.

> **Note**: It is not possible to change the time range for Aggregated PO from the UI. Aggregated PO automatically include statistics generated as of the last Aggregated PO generation until the beginning of the current generation. XTM Support can change this range if required.

Aggregated PO generation process
The generation process consists of the following steps:

1. **Initial validation**:
   verifies the most common rate card errors (missing rate cards for a given language/step, multiple rate cards, etc.).
2. **Project filtering**:
   only projects which are not deleted and contain statistics for a given time period are included.
3. **Calculating costs:**
   for all valid projects included.

PO documents are created for all users who were included in the newly generated costs.

Aggregated PO generation results
The result of the generation is a zip file with PO reports in PDF/XLSX format.
One PO for each linguist is created as a separate file. The file contains a list of projects and costs generated for a given linguist based on statistics from the listed projects.

> **Note:** there is no information about costs equal to zero for a given project in the Aggregated PO generation results. If for some reason the statistics generated zero costs, the project will not be listed in the file for that linguist at all.

If the sum of costs from all projects from a given Aggregated PO is zero, the file for this linguist will not be generated. XTM Support can provide detailed information if needed.

Aggregated PO vs. User Statistics
Aggregated PO and User Statistics are two different functionalities and present different datasets. Aggregated PO includes the date when the linguist performed an action on a given segment (translated, changed the status). The date when the task was completed is irrelevant. In User Statistics the date of completion determines how the statistics are generated.

Example
A linguist modifies some segments in March but modifies other segments and completes the task in April.
In Aggregated PO the segments modified in March appear on the Aggregated PO generated in March, and the segments modified in April appear on the Aggregated PO generated in April.
In the User statistics, the statistics for this task only appear in the report generated in April because the task was finished only in April.

Project Editor - Comparison of Metrics and Statistics

SOURCE statistics provide information about the number of segments, words, characters, and characters as a percentage in the source text that have been translated in a specific workflow step by a specific user.

TARGET statistics provide information about the number of segments, words, characters, and characters as a percentage in the target text translated in a specific workflow step by a specific user.

Metrics provide information about the number of segments, words, characters and words or characters as a percentage for the translated text and text to translate for the whole project.

It means that Statistics and Metrics indicate the same values for a step performed by a single user, for example:

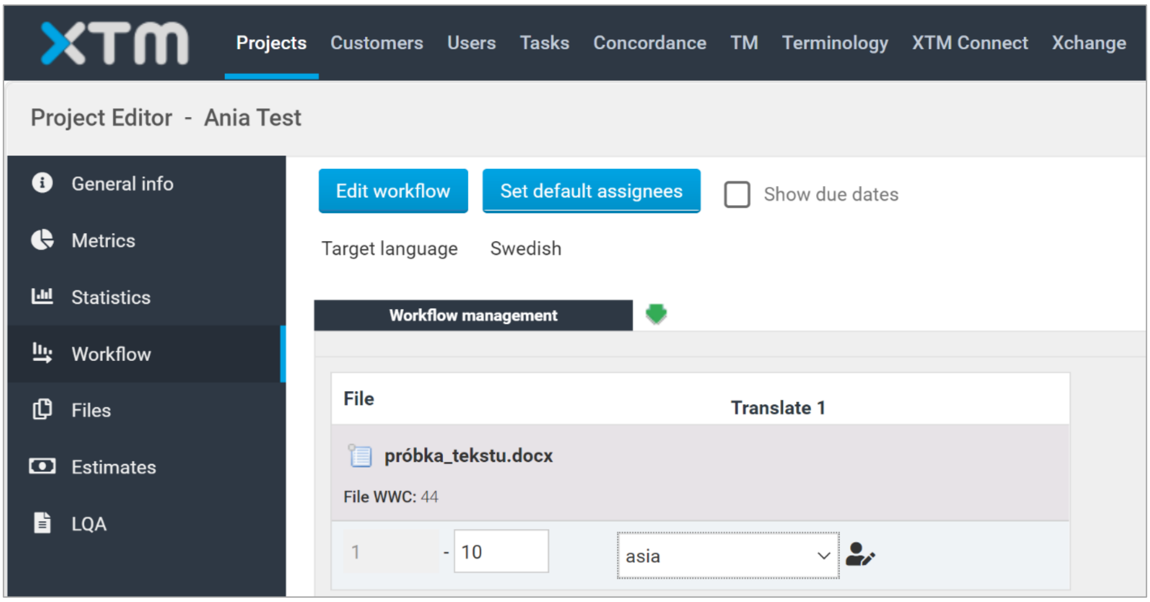
20 source no matching words translated into 25 target words by a user called *Linguist 1*
Metrics:
20 no matching words
SOURCE statistics:
20 no matching words
TARGET statistics:
25 no matching words

Statistics and Metrics indicate different values when multiple users are involved in a step including administrators and project managers, for example:

8 source no matching words translated into 11 target words by a user called *Linguist 1*
12 source no matching words translated into 14 target words by a user called *Linguist 2*
Metrics:
20 no matching words
SOURCE statistics:
Linguist 1: 8 no matching words
Linguist 2: 12 no matching words
TARGET statistics:
Linguist 1: 11 no matching words
Linguist 2: 14 no matching words

Metrics and statistics will also differ if machine translation is used. In this case the original metrics may show segments/words/characters in the no matching category and fuzzy matching rows. After translation, depending on settings, some text may have been machine translated and so now appears in that row.

Project Editor – Workflow



Workflow overview

Accessing Project Editor Workflow tab

1. Go to Projects > select the context menu icon ☰ next to the required project > select Manage workflow.

For languages with workflows:

An additional dropdown field allows you to filter the displayed languages. By filtering languages, you can easily batch update due dates for languages with the same workflow.

To find individual files:

Select the language button or alternatively select a language from the dropdown menu.

Editing workflow

The Edit workflow button at the top allows you to:

- add steps
- delete steps
- set when the TM is approved

The workflow can be changed for the whole project or for a single language.

If you have allocated resources to a language, click Start to start the workflow for that language.

Select the Save button the resources entered will be saved without starting the workflow.

Setting default linguist for a project

Allows you to set default linguist on a project leverl for every step and target languages without overriding existing assignments,

1. Go to Projects > Project Editor > Workflow > Set default assignees.
2. In the popup select which linguists are going to be automatically assigned to each workflow step every time a new file is uploaded to the project.

   The default assignees defined here will not overwrite the existing assignees in the workflow.

File WWC (Weighted Word Count) is shown in the Workflow management section.

1. Each match category (Leveraged, ICE, Fuzzy, etc.) is factored based on the following pre-defined values. Contact *support@xtm-intl.com* if you want to customize this matrix.
    a. No Matching 100%
    b. Machine Translation 100%
    c. 75-84% Fuzzy Match 70%
    d. 85-94% Fuzzy Match 60%
    e. 95-99% Fuzzy Match 30%
    f. Leveraged match 30%
    g. Repeat 30%
    h. ICE Match 0%
    i. Non-translatable 0%
    j. Fuzzy repeats (all three) 100%
2. The factor is applied on the total word count for that category

Example calculation

Weighted Word Count: 100 repetitions * 10% = 10 weighted words

On this page project managers can carry out many functions relating to the workflow:

- Open XTM Workbench in a read or write modes to view the task
- Check Metrics
- Split the file into bundles
- View the details of linguists and jobs
- Allocate linguists to the various tasks
- Move the jobs forwards and backwards in the workflow
- Upload XLIFF files
- Roll the project backward
- Download source files
- Run a selection of reports about the project

Workflow definitions

XTM default workflows include:

- translate
- translate # review
- translate # review # review
- translate > correct
- translate > correct > correct
- translate , correct
- translate , correct > review
- translate , review
- translate , review > review
- translate # correct
- translate > correct # review

Blocking mechanism between workflow steps

,	steps can be processed at the same time
>	the next step cannot be started until the previous step for that bundle is finished
#	the next step cannot be started until the previous step for all the bundles is finished

For each task, a linguist can choose to:

- finish the task
- reject the task
- decline the task: the PM will have to assign it to another person

Default workflow steps in XTM Cloud	
Step name	**User functionality**
Translate	Edit target text. Manually add comments.
Correct	Edit target text Manually add comments. If the target text is changed a new comment is automatically created to record the change made.
Review	Manually add comments
LQA	check translation errors.
Management task	Files can be downloaded but not updated. *Example* entering cost details, approving cost and proposals, printing files, sending files to client
Non-CAT tool process	Files can be downloaded and updated in XTM, but the TM and project segments will not be modified. *Example* DTP (Desktop Publishing)
Automatic	• Approve the TM of segments. • Set the minimum XLIFF:doc status of segments. • Set the XTM status of segments.

Note: The system administrator can also create custom steps.

When creating a new project by default each job contains all the segments from the file (e.g., if a document has 150 segments XTM creates the tasks for segments 1-150).

The project manager can then split the default tasks into smaller parts.

Each bundle in the project follows the same steps in the workflow.

Example 1

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

In this workflow example:

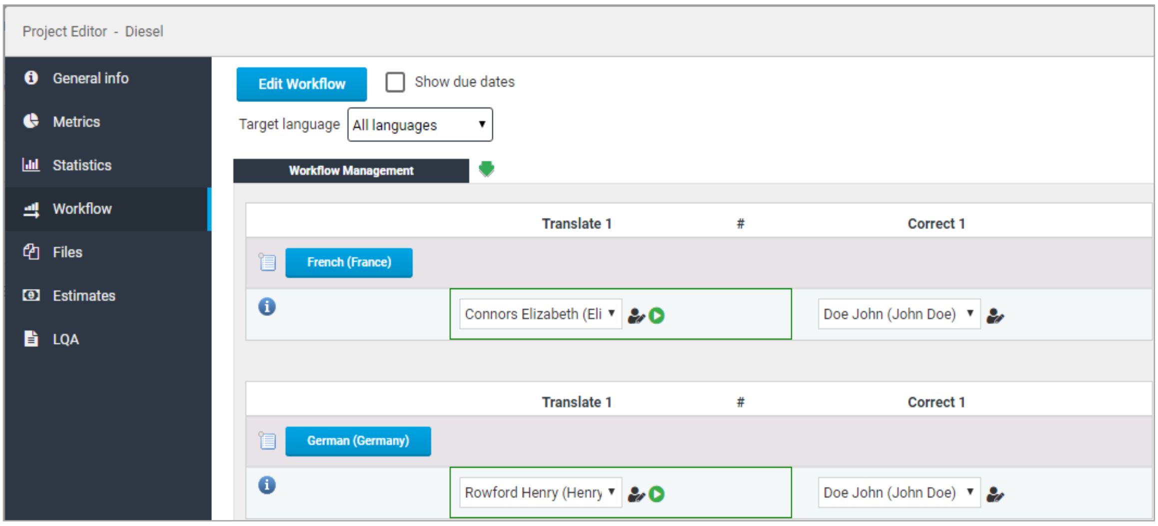
- Once the workflow has been started, Translator 1 and Reviewer 1 can work simultaneously.
- The tasks in Review2 are initially not active.
- When Reviewer1 has finished reviewing bundle1, the task Review2 for bundle 1 becomes active and Reviewer2 can start work, irrespective of the status of bundle 2.

Example 2

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

In this workflow example:

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



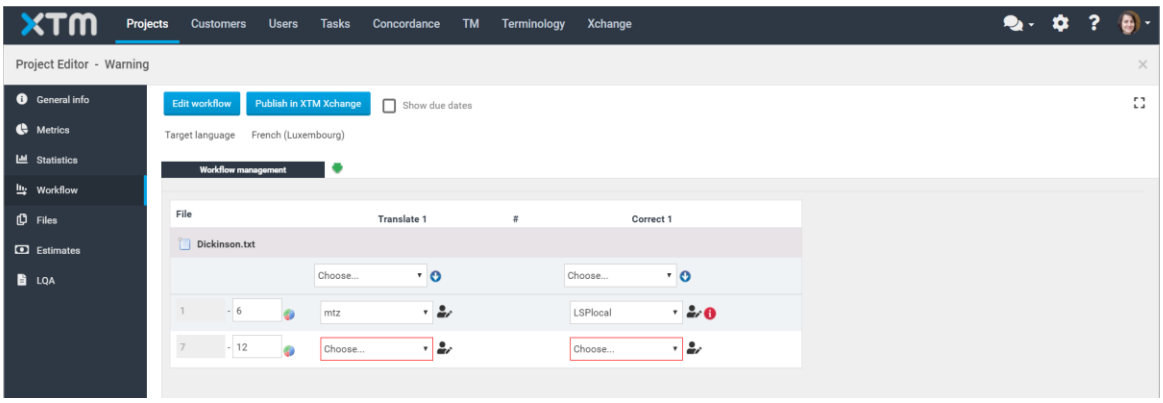
Applying roles to Workflow stages

Splitting a file into bundles

It is possible to split a file into bundles of segments so that multiple linguists can work on the file concurrently reducing throughput time.

To split a file into bundles:

1. In the box under the file name, enter a lower number in the right-hand field. For example, if your file consists of 1-12 segments, change 12 into 6.
2. Click away from the box. XTM automatically creates a second bundle with the remaining segments.
3. Click Save to let the system refresh the view.
4. Assign linguists to bundles and save your choice.



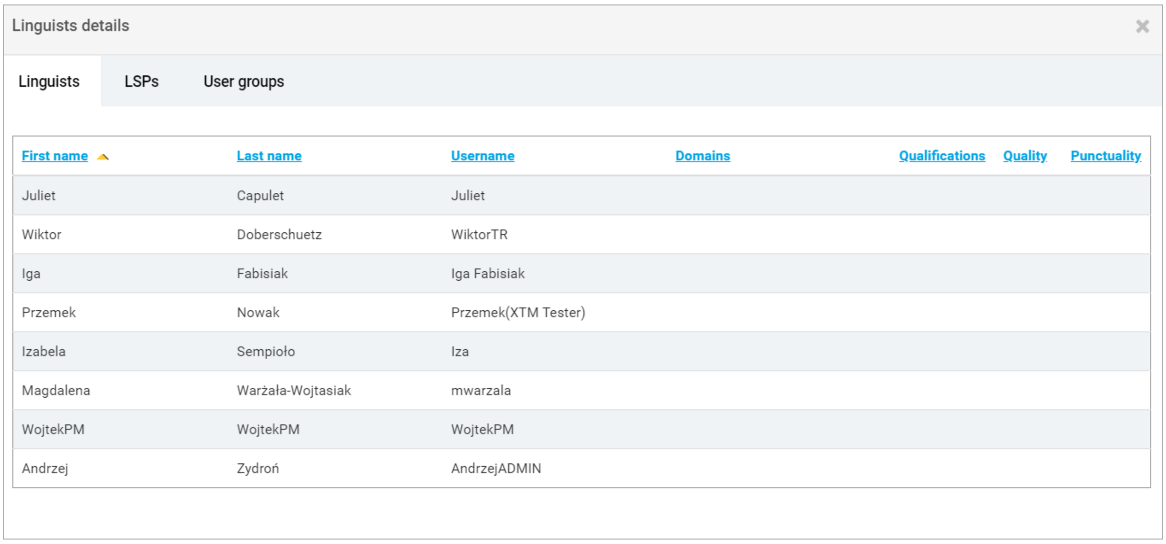
Splitting files into bundles

Allocating linguists to tasks

The top line of the workflow management is a general line for the entire project. Using this line it is possible to allocate a translator or reviewer to all the files or bundles in the project in one go. Use the icon to replace all the names that have been already set. The lines below relate to the individual files or bundles in the project.

To allocate a linguist:

1. Select the name from the dropdown list on each task. Note: only linguists with the correct language pair will be displayed.
2. Select the edit user icon to open a window listing the details of the possible linguists. Then double Select the required name.
3. Select a name from the top dropdown list to enter that name in all empty tasks, for all files, for that step.
4. Select a name from the top dropdown list and select the replace all icon to enter it in all tasks, for all files, for that step



First name	Last name	Username	Domains	Qualifications	Quality	Punctuality
Juliet	Capulet	Juliet				
Wiktor	Doberschuetz	WiktorTR				
Iga	Fabisiak	Iga Fabisiak				
Przemek	Nowak	Przemek(XTM Tester)				
Izabela	Sempioło	Iza				
Magdalena	Warżała-Wojtasiak	mwarzala				
WojtekPM	WojtekPM	WojtekPM				
Andrzej	Zydroń	AndrzejADMIN				

A popup with the details of linguists

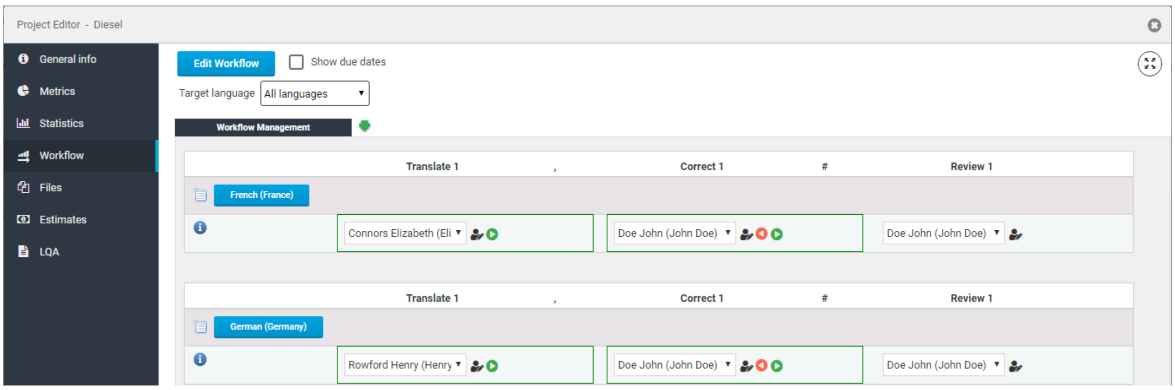
Saving and starting the workflow

When you have allocated linguists to the various tasks you must select the save button before navigating away from the screen.

When you want to start the workflow, select the start button. Note depending on which workflow you have selected a number of tasks will have a green surround. This indicates that the tasks are active and the linguists can work on them.

Finishing and rejecting tasks

The PM can move the file onto the next step in the workflow or send it back to the previous step.



Managing the workflow

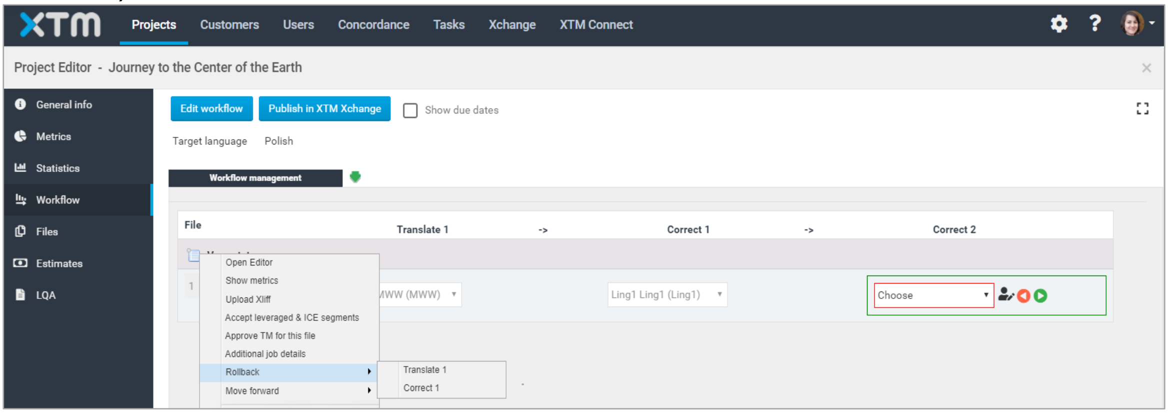
In the above image the tasks for segments 1 -15 are active in Translate 1 and Correct 1. If you wish to finish either of them and move them onto the next step select the green arrow. Similarly, if you wish to send a task back to the previous step, Select the red arrow. Remember to select the save button when you have moved the file. To finish a project that is partially complete, manually move the project through all the steps in the workflow including the last step.

Roll back

A roll back is an action which takes the project back to a previous step in the workflow. When you choose this option XTM will revert the file to the state at the end of the selected step. Any changes that have been made in subsequent steps are removed and as long as the source and target segments are different in the earlier step any TM that is has been created is overwritten.

To roll back a project back:

1) Open the project menu and choose Rollback.
2) Choose the step you wish to roll the project to.
3) A pop-up window appears asking you to confirm your action.
4) Select OK.



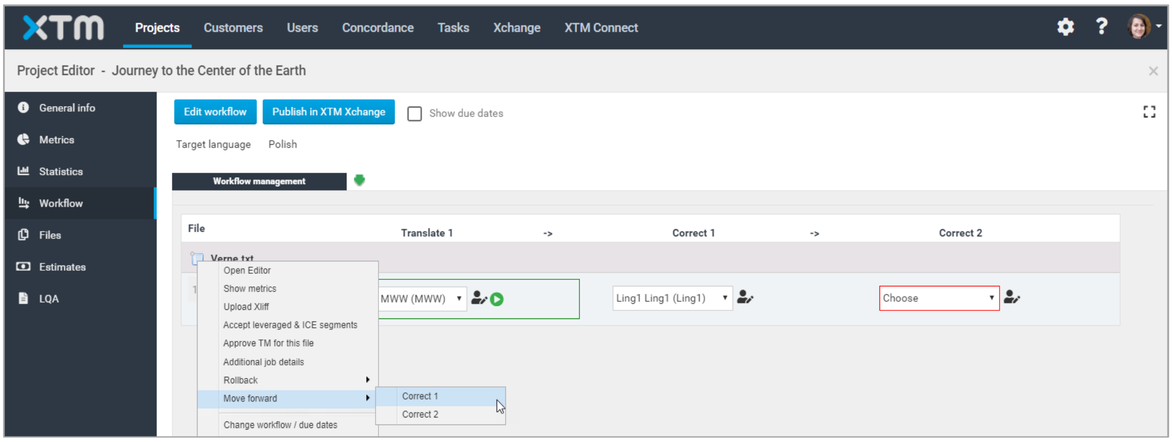
Rollback menu

Move file forward to a subsequent step in the workflow

It is also possible to move the file forward to a subsequent step in the workflow.

To move a project forward:

1) Open the project menu and choose Move forward.
2) Choose the step you wish to forward the project to.
3) A popup appears asking you to confirm your action.
4) Select OK.

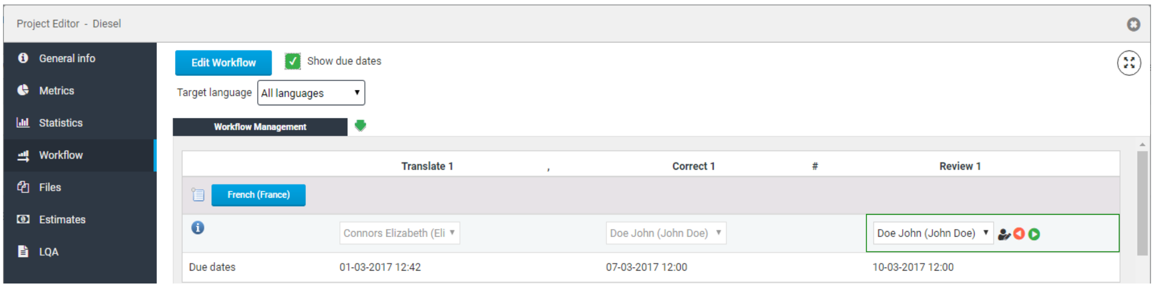


Move forward menu

Modifying the workflow and setting dues dates for steps

Once a project has been created the workflow can be modified and due dates set. You can do this on a project, language, group or file level. Due dates can be updated in one go for all languages with the same workflow

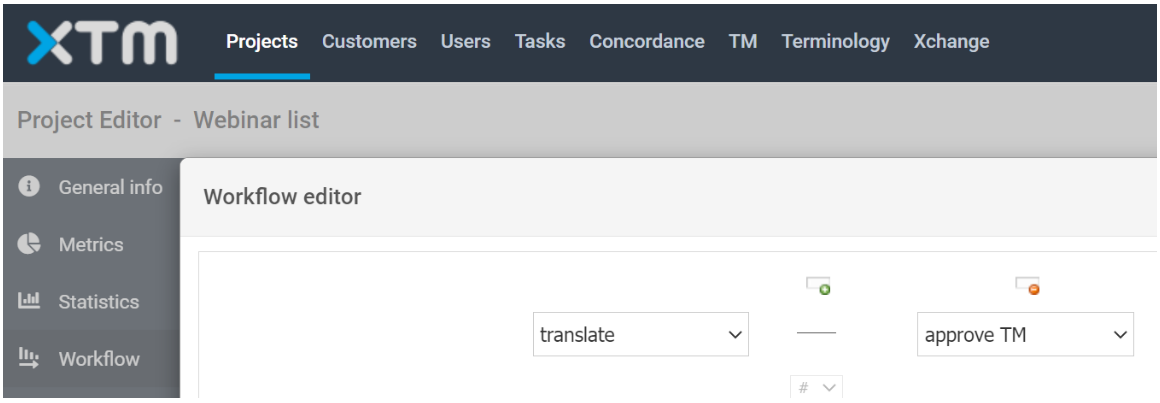
To view any due dates that have been set, check the “Show due date” box. This displays the dates below each step highlighting any expired dates in red.



Workflow showing dues dates

To edit the workflow or to add or modify due dates Select the “Workflow / Due dates” button.

This brings up the following popup:

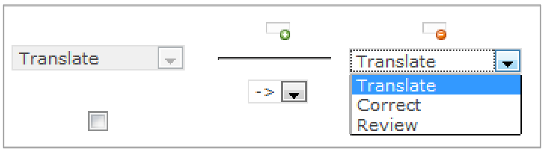


The workflow editor popup

The Workflow editor popup allows you to:

- Add additional workflow steps
- Determine the functionality of workflow steps
- Determine the blocking mechanism between steps
- Delete workflow steps
- Determine the LQA function for each step individually:
    - No – LQA is disabled
    - No, but show existing errors – LQA only displays errors reported in previous steps
    - Yes, save result in user record – LQA result for the translator from the previous step is saved on the Rating tab in the Edit user window
    - Yes, don’t save result in user record – LQA is enabled but results are not saved with linguists
- Set the TM status to approved for every change in the target segment.
- Set the due date for each step in the workflow.

To add a workflow step firstly decide where you want to insert the step and then Select the plus icon . A new step will appear and then select the function of the step from the dropdown menu.



Selecting the function of a step.

Next determine the blocking mechanism between the steps by selecting the appropriate symbol from the dropdown menu.

Selecting the blocking mechanism between steps

The blocking mechanism between steps

,	steps can be processed at the same time
>	the next step cannot be started until the previous step for that bundle is finished
#	the next step cannot be started until the previous step for all the bundles is finished

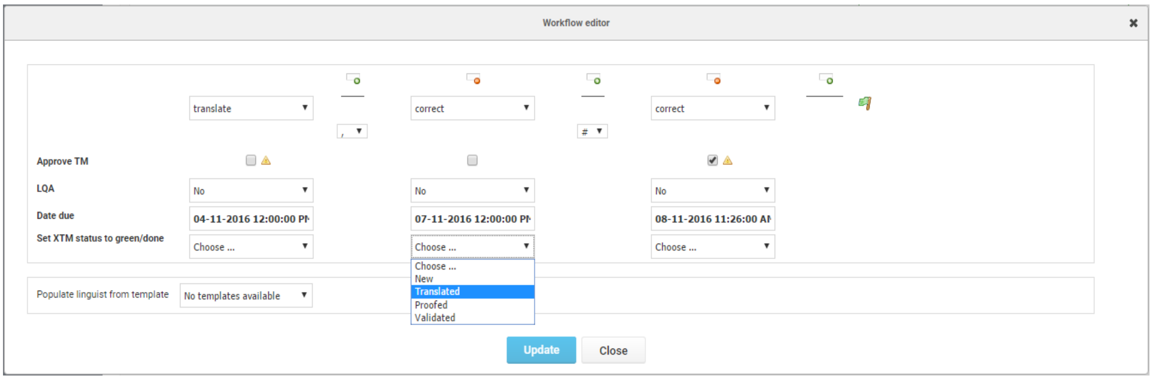
To delete a step in the workflow

Select the delete icon .

Set XTM status to green/done

When TIPP has been activated in Configuration > Settings > System > General, a new field appears in the Workflow Editor window called Set XTM status to green/done. This allows you to set the status of segments in XTM depending on their status in an imported XLIFF:doc.

To use this feature, you set the XTM status value from the dropdown menu and then when you import an XLIFF:doc into XTM any segments with a status greater than or equal to the set value, will be automatically given a green/done status in XTM.



Setting XTM status to green/done in the Workflow Editor.

Use the Populate linguist from template option to select a template to populate workflows steps with linguists only and decide whether to overwrite linguists that are already assigned.

Files that cannot be analyzed

There are three reasons why a file cannot be processed in XTM:

1. **The file is not supported by XTM**.
   There is not a suitable file filter to extract content. For example, a .png file cannot be processed in XTM
2. **The file is empty**.
   Files of this type have a suitable filter but do not contain any text for translation
3. **The file is invalid**.
   These files cannot be processed by the file filter. This happens if the file extension has been changed or if they contain incorrectly formed XML

In these cases, if the option has been switched on in Configuration > Settings > Workflow > Workflow Options, the file is displayed as shown below which allows the project manager to set and manage a workflow for this type of file.

When you allocate a linguist to a task for non-analysable file, the task will appear in their inbox, but when they Select it the only option will be to download the file and work off-line. XTM Workbench is not available.

Email notifications

XTM sends out emails when certain events happen in the system particularly in relation to project progress. Below, there is a list of the events and people to whom the emails are sent.

XTM emails

	ROLE OF RECIPIENT						
EVENT	All users	Project Manager	PM - Customers and Projects	PM - Create and view	Customer project manager	Linguist	Project watcher
New user created	✓						
New project created (analysis finished)		✓	✓ If creator	✓ If creator	✓		✓
New task allocated and started		✓				✓	✓
Task deactivated		✓				✓	✓
Task finished *		✓				✓	✓
Task declined *		✓					✓
Task declined when a user is deleted		✓					✓
Task re-opened		✓				✓	✓
Task reassigned						✓	✓
Task deleted						✓	✓
Password Reminder	✓						
Due dates		✓	✓	✓	✓	✓	✓
Group task allocated						✓	
Group task accepted		✓				✓	
Group task rejected after accepting		✓				✓	
Allocation order group task rejected by linguist		✓				✓ to next linguist	✓
Project finished to PM		✓					✓
Last linguist task changed		✓					✓
Project confirmed		✓	✓	✓			

Events marked with a * mean that the email is sent after an action by the linguist and are only sent for active tasks.

Emails are not sent to the person making the change thus if a project manager assigns a translator the PM will not receive an email about this.

If there is no PM allocated to the project emails will be sent to all PMs in the system.

XTM Xchange

	RECIPIENT		
EVENT	Company	Freelancer	
Registration	✓	✓	
Job published	✓	✓	Only if the “Send me emails about suitable jobs” is checked.
Job updated	✓	✓	
Added as a user	✓	✓	
Added as a subcontractor	✓		

XTM Subcontracting emails

	RECIPIENT
EVENT	Subcontractor Project Manager
Contractor assigns project to Subcontractor	✓
Contractor starts project	✓
Contractor updates project	✓
Contractor deletes project	✓

XTM Portal

Apart from the emails above XTM Portal also send out the following additional emails.

	RECIPIENT	
EVENT	LSP Project Manager	Customer project manager
Customer contact request	✓	
Customer project manager registered	✓	✓
Payment processed	✓	✓
Payment page accessed	✓	

Project Editor - Workflow menu

When you Select the icon by each file a menu appears allowing you to perform a number of actions.

Open XTM Workbench

By selecting the menu item you can view the job in XTM Workbench. The first window that opens allows you to select which step in the workflow you want to open, who you want to open the XTM Workbench as and whether or not you want it to be read only or with full access.

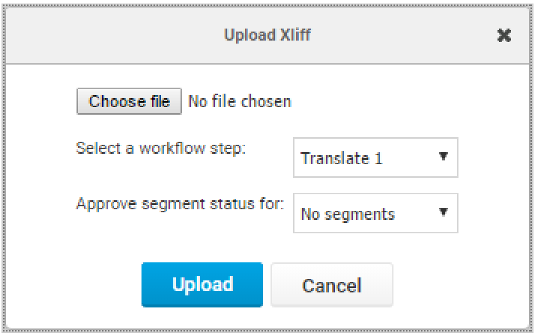
Show metrics

The menu item brings up the current metrics for the file allowing you to view the current progress of the file.

Upload XLIFF

To upload an XLIFF file after off-line translation or review select the menu item “Update XLIFF”. This brings up a window that allows you to select the file to upload. You can also specify which step in the workflow has been completed and whether you want to approve the segment status. There are 4 options for the approval:

1. No segments
2. Use the XLIFF:doc segment status
3. Changed segments only
4. All segments



The XLIFF upload window

Approve leveraged segments & ICE segments

Selecting this option will change the status of all segments with 100% and ICE matches to done changing the colour from orange to green.

Approve TM for this file

Selecting this menu item approves all the translation memory for this file.

Additional job details

Opens a window with detailed project data, such as job ID, language code, project ID, customer ID and more.

Rollback

Sends a job back in the workflow to the selected step. All segment statuses and modifications will be reset to the state saved in the step you selected.

Move forward

Pushes a project forward in the workflow to the selected step. All the changes made in your file in the current step will be saved.

Start main workflow

For projects with a pre-processing step this option starts the main workflow for a selected language or all languages, even when the pre-processing step is not finished. If the main workflow was started before finishing the pre-processing step, then the main workflow source text may change as the pre-processing step proceeds. TM matches are applied to the updated main workflow source text and include matches that come from translations provided for the earlier version of the main workflow source file.

Change workflow / due dates

Selecting this menu item brings up the window to edit the workflow and set due dates for the file.

Download source file and reference material

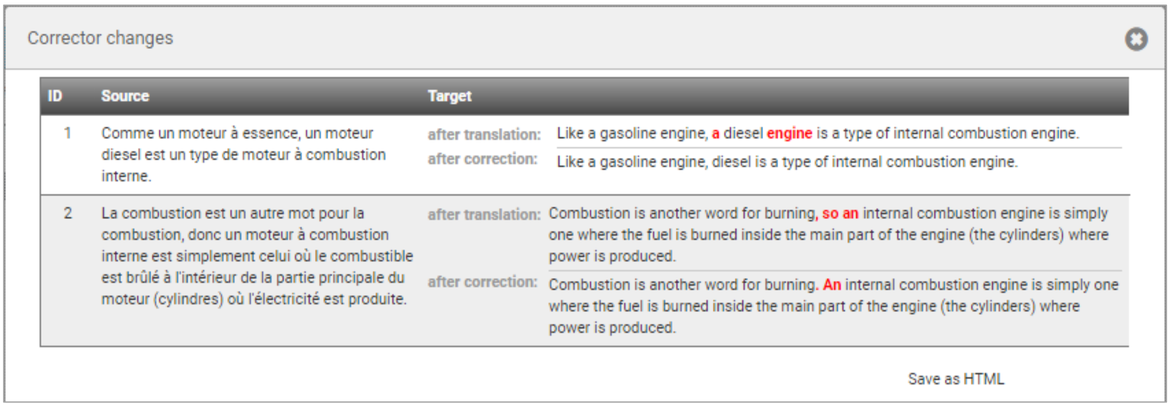
To download the source file or reference material for all the files in the project select the downward arrow.

To download the source files or reference materials for one file select the relevant menu item.

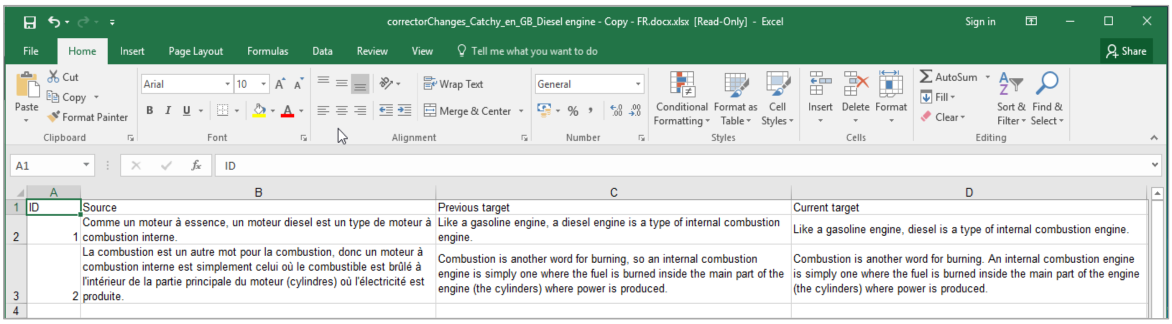
Reports

Selecting this menu item gives you five options:

1. View a report of the changes made by a corrector,
2. Download the report of corrector changes in an Excel file
3. Download a report of all the comments in the file,
4. View File history
5. View LQA report



Viewing the changes made by the Corrector



An Excel report of changes made by the Corrector

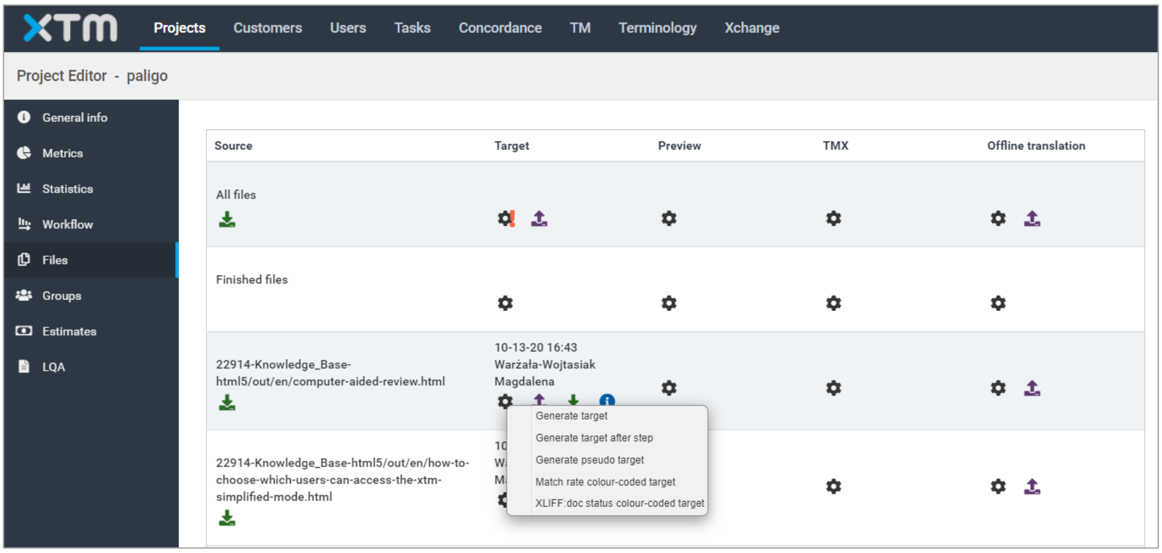
Reopen file

Options available to reopen a file:

1. Reopen — reopens the workflows and activates the final step in a workflow without pre-processing.
2. Reopen and close main workflow — reopens the pre-processing step and closes the main workflow.
3. Reopen and leave main workflow running — reopens the pre-processing step without making any changes to the main workflow.

Reopening workflows does not remove translations provided previously for the files in the workflow.

Project Editor - Files



The File Management Window - multiple target languages

Generating and downloading files in the Project Editor

When all the steps in the workflow are complete the target file is automatically generated. Files can be manually generated at any point during the process of translation.

Icon	Action
	Generates the latest version of the files at that time
	Downloads the file
	Displays the details and history of the generation of the files and allows you to download previous versions of the file.
	Uploads a file

In a project with multiple target languages, when you initially Select the Files tab, you have the option to generate and download all the files in the project or only the files that have been finished in the workflow.

To manage the files for a particular target language, select that language from the dropdown menu at the top. You can generate and download all the files or only the finished files but this time it is for the specified language only.

When you Select the generate icon the date and time of generation and the person who generated the file are displayed. If you Select the information icon a history of the generated files is displayed. To download a file, Select the green arrow or to delete the history from the system Select the red cross. The details of the most recently generated file are visible in each cell.

To download the source file, Select the green arrow by the source file name.

In the Project Editor > Files tab you can generate and upload files for:

1. Source
2. Target
3. Preview
4. TMX
5. Offline translation

In detail, these options include:

1. Source
    a. Download source files
    b. Download reference material
2. Target
    a. Generate target:
    generate the target file as it currently is. The target file is also automatically generated at the end of the workflow.
    b. Generate target after step:
    generate the target file after a selected step in the workflow. The translation in the generated target will reflect the changes made up to this specific step
    c. Generate pseudo target:
    generate a pseudo target file where all the texts have been replaced by underscores. Allows you to quickly check that all the correct text has been extracted for translation.
    d. Match rate color-coded target
    e. XLIFF: doc status color-coded target
    for each source file it is possible to generate the target file where the text has been color-coded according to match rate or XLIFF:doc status, with the TIPP option enabled in configuration in the case of the latter (see more **here**).
3. Preview
    - PDF
        - Document
        A WYSIWYG view of the target file
        - A source / target table
        A source / target table where all the text from the same paragraph is in the same cell
        - Paragraph view
        - Extended table
        Edit Distance Score for each segment, for each workflow step and for each language
        Back translation report column
        - Match rate color-coded target
        - status color-coded target

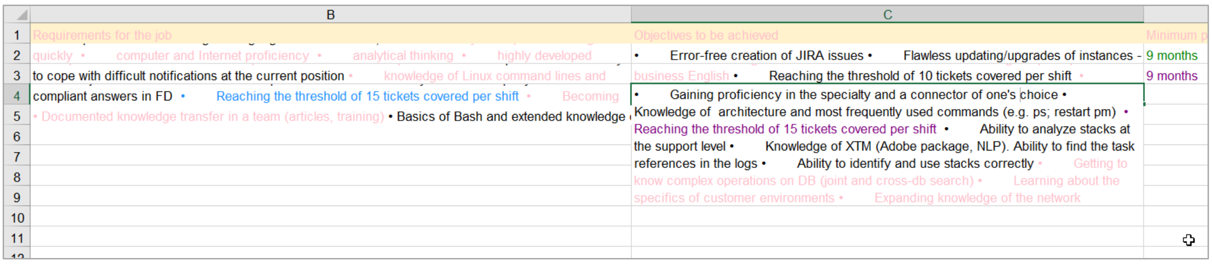
- HTML
    - Document
      A WYSIWYG view of the target file
    - A source / target table
      A source / target table where all the text from the same paragraph are in the same cell
    - Extended table
    - Excel
    - Extended table
- TMX
  The TMX file is based on the project XLIFF file and contains all the TM matches for the project and the translated segments. The file types that can be downloaded are:
    - XLIFF
    - Multi-File XLIFF
      Available when there are multiple source files. It creates one XLIFF file making the management off-line translation easier.
    - TIPP
      The Translation Interoperability Protocol Package (TIPP) is an information container that allows the seamless exchange of information between different independent Translation Management Systems (TMS).
    - XLIFF:doc
      file which can be opened in compatible programs such as MemoQ, edited and then uploaded again to XTM.
- Offline translation
    - Generate TIPP
    - Generate XLIFF
    - Generate XTM Excel Editor Download to use the XTM Off-Line Editor
    - Generate PDF review

Generating color-coded target

You can generate XML, Words, Excel or InDesign target files where the text is coloured depending on the match type or XLIFF:doc status.
The colours are hard-coded, but XTM Support Team can customize them if needed.

Default color coded target for XLIFF:doc statuses	Hex code	Color
New	000000	
Translated	FFA500	
Proofed	008000	
Rejected	FF0000	
Validated	00FF00	

Color coded target for TM matches	Hex code	Color
ICE	00FF00	
Leveraged match	008000	
Fuzzy match 95-99%	FFFF00	
Fuzzy match 85-94%	FFA500	
Fuzzy match 75-84%	8B6914	
Repeats	800080	
Fuzzy repeat 95-99%	0000FF	
Fuzzy repeat 85-94%	1E90FF	
Fuzzy repeat 75-84%	ADD8E6	
Machine Translation	FFC0CB	
No match	000000	



Example of a colour-coded target Excel file

Reanalysis of the project

When you want to add a new source file to an existing project or only update the source file already in translation, you can choose if an analysis of the project should be performed again. Before you decide to reanalyze your project, remember that reanalysis may introduce several changes to the existing project:

- Metrics and TM matching will be calculated anew
- Target segment comments added in XTM Workbench will be deleted
- Workflow allocations will change for overwritten files
- Statistics will remain unchanged

Project Editor – Groups

You can access the tab if XTM Administrator has enabled Grouping section in Settings. You can group files automatically depending on the settings selected by the Administrator in the Settings > Projects > Grouping section.

Select the Group automatically button to group files by the number of files in one group or by the number of groups.

Creating a new group

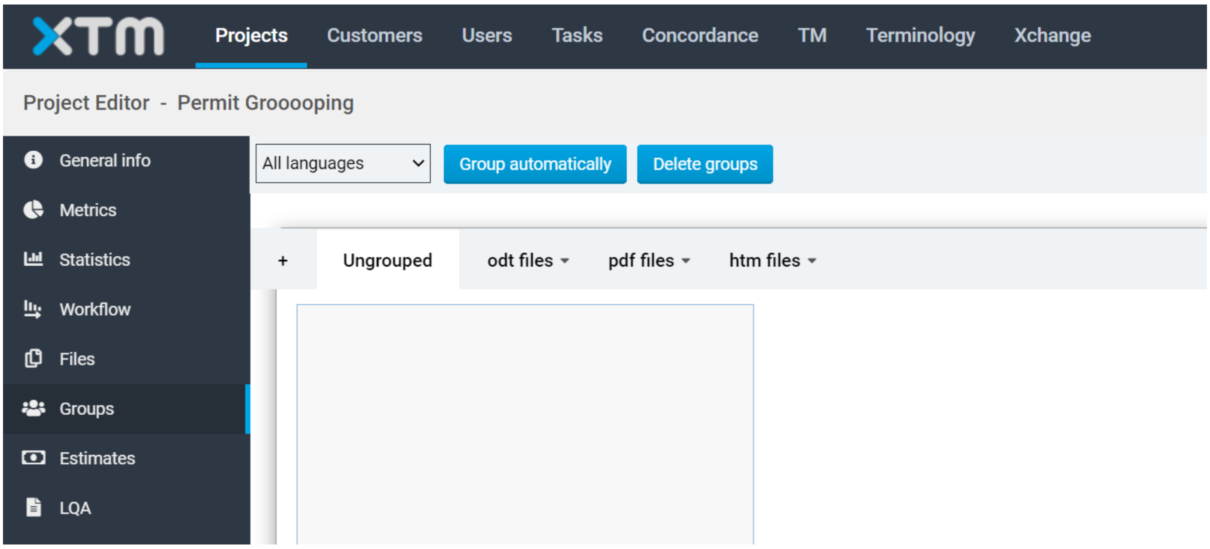
1) To create a new group, select the + button.
2) New group is added to the groups ribbon.

Deleting a group

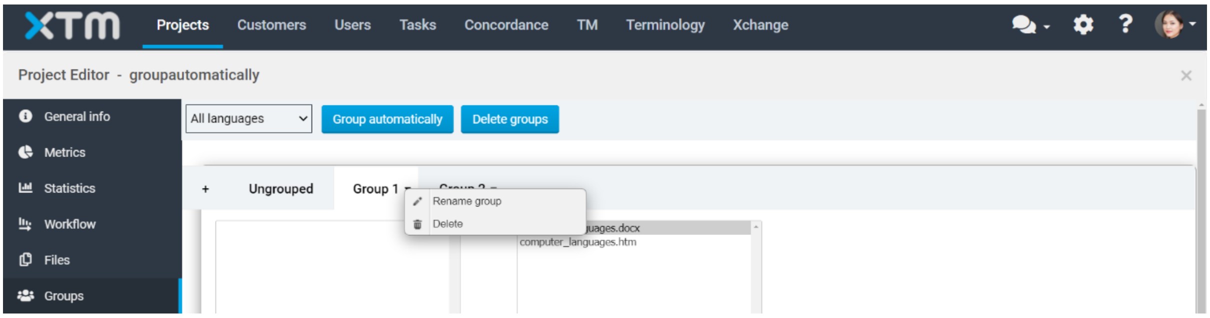
1) Select the required group by selecting on the downward arrow. Select Delete.
2) Confirmation popup opens. Select OK.

Renaming a group

1) Select the required group by clicking the downward arrow. Select Rename a group.
2) Enter a new name in the popup. Select Save.



The Groups tab in the Project Editor



Deleting a group

Project Editor - Estimates

There are two sections in the Estimates tab:

1) Proposals – this is what you plan to charge your customer
2) Costs – this is what your suppliers, such as freelance translators will charge you.

Project Editor – Estimates: Proposal

In this tab you can view and edit the customer estimate for the project. It shows the cost and duration of the project and hence the delivery date. The estimate is available for:

- The entire project (All languages)
- Per target language
- Per file

Clicking any of these cells in the project estimate will display the details of the estimate. You can view the details of the project, each language and each job.

The estimate is calculated by XTM and then final values can be manually edited by the project manager.

Estimate parameters and factors

Initially a base cost and duration is calculated for the translation project and then a number of factors and parameters are applied to adjust this cost to give an exact estimate value.

The parameters and factors that are used to calculate the cost and duration of the project are:

- Base cost per page, word or character
- Base number of pages, words or characters per day
- Minimum word or character count for an estimate
- Minimum project charge
- Currency
- Calculation method
- Work schedule
- Project management fee
- Project discount days or price factors
- Duration rounding point
- Paying VAT
- Copies
- Speed of delivery
- Metrics
- Language combination
- Workflow - Price and duration factors for additional steps in the workflow
- Actual price or factors for document authentication

The estimate factors are given a default value when XTM is set up but are configurable at a customer level (Customer tab > Customer list > menu icon for selected customer).

Language combination factors can also be set by the administrator on a system wide level.

If the factors are not set for a customer, XTM will use the system default values. Each factor has a value which will affect the estimate.

- The default value is 1 and this will not affect the estimate value
- Values great than 1 mean that estimate value will be increased
- Values less than 1 mean that the estimate value will be decreased

Minimum charges

You can set a minimum word count, character count, and a total minimum charge for a job.

Example 1

Minimum charge: EUR 69.00

Project estimated at: EUR 67.50

The minimum charge is taken to calculate the total project price.

Example 2

Project word count: 13 words

Minimum word count: 12

Cost per word: EUR 1

Minimum charge: EUR 100

The minimum charge is not taken to calculate the project price as the minimum word count is lower than the total project wordcount.

The project price is: 13 words x EUR 1=EUR 13

Work schedule

There are three options:

1. Monday to Friday
2. Monday to Saturday
3. All days

Delivery speed factors

There are seven delivery types shown below. For each of them, price and duration factors are specified.

- Normal (default)
- Make it cheaper - level 1
- Make it cheaper - level 2
- Make it cheaper - level 3
- Make it faster - level 1
- Make it faster - level 2
- Make it faster - level 3

The default value for Normal is 1. This is the value taken when initially estimating a project.

Users can choose the delivery type when preparing an estimate for the project.
Users may change the delivery type and language combination factors for each job or for the whole project. The estimate is recalculated each time a language combination factor or delivery type is changed.

There is also a simplified implementation of these factors where the user has reduced set of options. First, there is a “Need it sooner?” button which increases the price (Make it faster – level II). If this is selected, then you have another button “Need it cheaper?” Selecting this will set it back to Normal.

Rounding point

The rounding point is the decimal part of a day at which the number of days is rounded up rather than down. For example, if the rounding point is set to .2 then any duration with a fractional number of days great than .2 will be rounded up so that 2.1 is rounded down to 2 but 2.3 is rounded up to 3. This value can be set by the project manager and should be a decimal value less than 1.

Metrics factors

For each of the following types of matched segment there is a price and duration factor.

- Non translatable
- ICE matches
- Leveraged matches
- TM fuzzy matches for three categories (75%-84%, 85%-94%, 95%-99%)
- Repetitions
- In-document fuzzy matches for three categories (75%-84%, 85%-94%, 95%-99%)
- Machine translation

Using each factor and the text count, XTM calculates a global metrics factor according to the following formula.

Global metrics factor = Sum of (text type count/total text count * type factor).

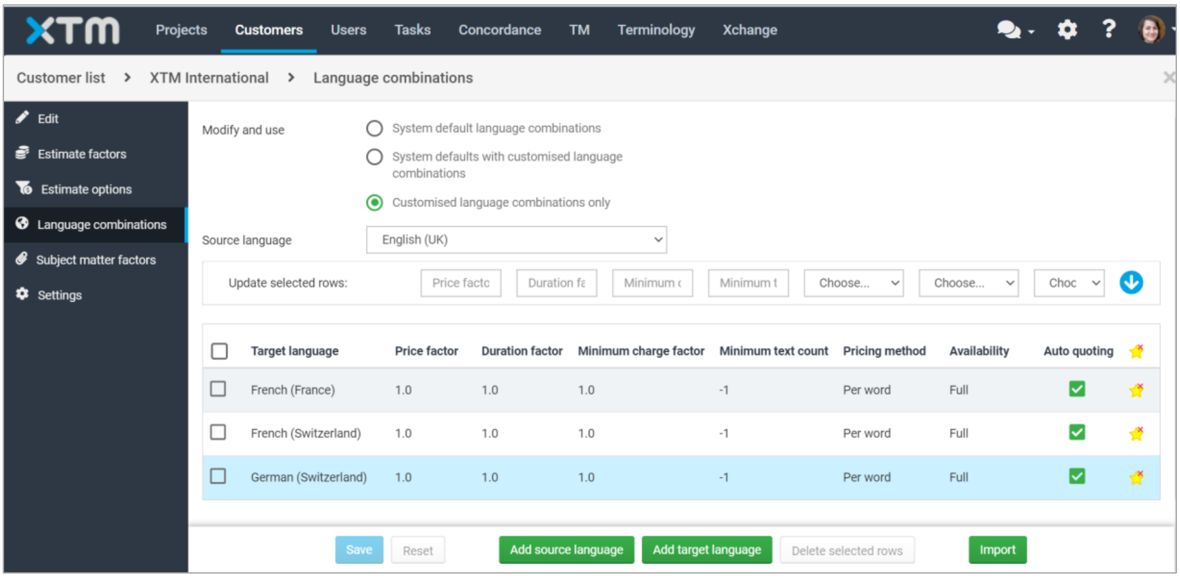
Example of a metrics factor calculation

Metrics	Word count	Price factor	Discounts price factors	Duration factor	Discounts duration factors
Total	1000	1	1	1	1
Non Trans	100	0.1	0.01	0.15	0.02
ICE	150	0.2	0.03	0.25	0.04
Leveraged	50	0.3	0.02	0.35	0.02
Fuzzy 99%	5	0.8	0	0.9	0
Fuzzy 94%	10	0.85	0.01	0.85	0.01
Fuzzy 84%	15	0.9	0.01	0.9	0.01
Repetitions	200	0.3	0.06	0.5	0.1
In doc 99%	1	0.8	0	0.8	0
In doc 94%	2	0.85	0	0.85	0
In doc 84%	3	0.9	0	0.9	0
No matching	464	1	0.46	1	0.46
TOTALS			0.61		0.67

Global Metrics Price Factor = 0.61
Global Metrics Duration Factor = 0.67

Language combination factors

The administrator can customize the language combinations for the entire system while the PM – for each customer. This defines which language pairs are available in the project creation window and also allows you to set the duration and price factors for each language pair. The customization of language pairs is performed on the Edit customer window and described in detail under Customer Editor section of this manual.



Setting language combination factors for customers

Estimate calculations

Base cost and duration calculation

Firstly, XTM calculates a base cost and base duration for the project.

The base cost is calculated according to the formula:

Base cost = Total count of words or characters * Base cost per words or characters.

Base duration is calculated according to the formula:

Base duration =Total count of words or characters / Base words or character per day

Calculation method: Multiplication or Addition

Addition: All factors are added and then multiplied by the base cost according to the formula:

Final price = base cost * (1 + (language combination factor – 1) + (metrics factor – 1) + (delivery type factor – 1))

Multiplication: All factors are multiplied by the base cost according to the formula:

Final price = base cost * language combination factor * metrics factor * delivery type factor.

Job price duration and delivery date estimates

Job estimates are calculated after the job has been analyzed and are based on all the factors previously described.

The estimated delivery date is calculated using the estimated duration time plus one day, the working schedule, and finally taking into account the configurable rounding point.

Initially the estimated price/duration and final price/duration equal to each other but the Project Manager can change the Final values after reviewing the estimate.

The Final Language combination delivery date and project delivery date are based on job estimates, so XTM stores the duration of each job. Since delivery dates cannot be summed up only the duration time (and not the delivery date) is modifiable at the job level.

Target language price duration and delivery date estimates

An estimate for each target language is calculated after all the jobs have been calculated, by summing the values for all the jobs in the target language.

Additionally, the Minimum text (word/characters) factor is taken into account. If the sum of all jobs in the current target language does not fulfil the minimum text count then the minimum charge is taken.

If the jobs fulfil the minimum text count then the parameter named “Minimum Charge On Discount” is checked. If the estimated price is lower than minimum charge, the minimum charge is taken as the estimated price.

After preparing the price as above, language combination level discounts are taken into consideration (as described in job level).

The calculated price is known as “Estimated price” and at this stage this is the final target language price. The estimated duration and delivery date are calculated in the same manner as for the Job duration and delivery date. Similar to the job calculation, only the duration time and not the delivery date is modifiable.

Project price, duration and delivery date estimates

The Project estimate is calculated by summing all the target language estimates.

Then the customer discounts are taken into consideration which may increase or decrease the estimates.

At the same time, project level discount rules are taken into consideration (as described in job part).

The calculated price is known as "Estimate" and at this stage is the same as the "Final" price which is modifiable by the Project Manager. The estimated duration and delivery are calculated in the same manner as the Job duration and delivery.

At this stage both the duration time and delivery date are modifiable.

The Project also has a Final Auto Price and Final Auto duration and delivery dates. However, this feature must be switched on for each language combination.

Costs overview

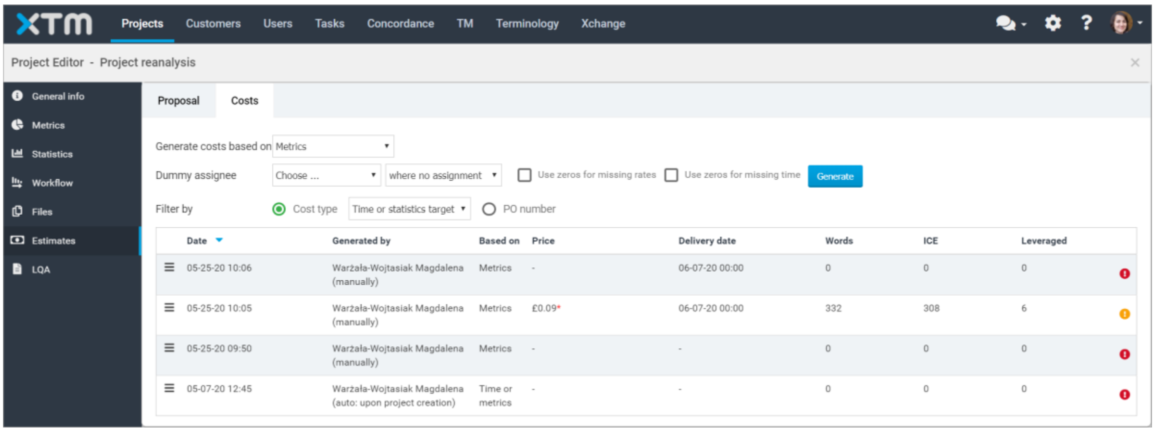
The costs tab allows you to calculate your direct cost for translating the project. The figures are based on the rate cards of the linguists who have been assigned to tasks in the workflow. By selecting the relevant option from the dropdown menu, you may choose to calculate based on:

- Metrics
- Current metrics
- Statistics source
- Statistics target
- Time or metrics
- Time or current metrics
- Time or statistics source
- Time or statistics target

There are also options to replace missing rates or time with zeros or to choose a "dummy linguist" whose rate card settings would be used for cost estimation either for the entire workflow or only where no linguist is currently assigned.

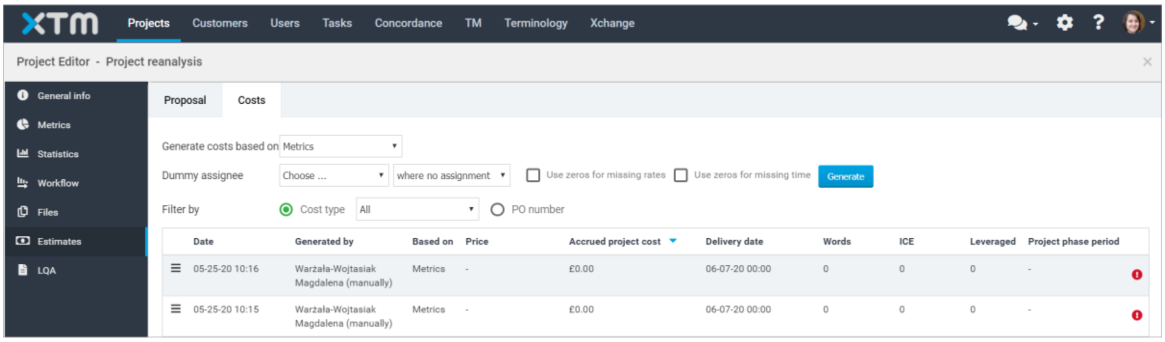
Each time the Generate button is selected the costs are recalculated and stored as a separate line. Also, you can filter the costs by:

- their type (Metrics, Current metrics, Statistics source, Statistics target, Time or metrics, Time or current metrics, Time or statistics source, Time or statistics target)
- PO number



Project Editor – Estimates > Costs

When you are running a continuous project and have configured options for automation of continuous projects available on the Configuration tab > Data > Estimates > Cost settings, you can notice that the Accrued project cost and Project phase period columns fill in with data during specific events such as reanalysis of the project or uploading new files with the same name as already existing in the project.

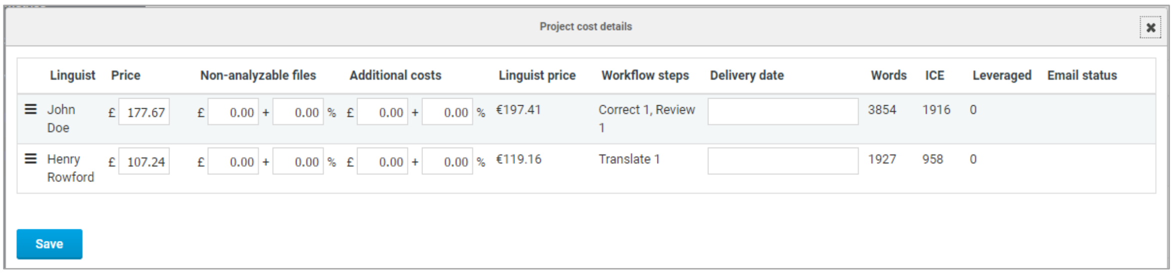


Accrued project costs and Project phase period columns for continuous projects

The important columns for continuous projects are:

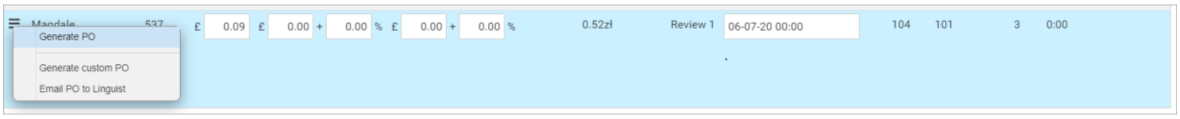
- The Price column indicates the individual cost of each estimate.
- The Project phase period column indicates the time range when a specific continuous project phase was in translation.
- The Accrued project cost column sums the previous costs that have an entry in the Project phase period column — it sums only costs of the completed project phases and any costs generated since completion of the latest phase.
- The Generated by column informs if costs have been generated manually or automatically and what event triggered them.

To view the details of the cost, Select the line. The cost for each linguist is shown on a separate line. Both costs for non-analyzable files and additional costs can be specified as either a fixed amount or as a percentage of the base price.



Project Editor – Estimates costs details

If the full cost cannot be calculated, then the price will be shown with a red star and an alert icon will appear in the last column. Hover over the icon to show a popup message explaining why the full cost is not calculated.



Project Editor – Generating supplier POs

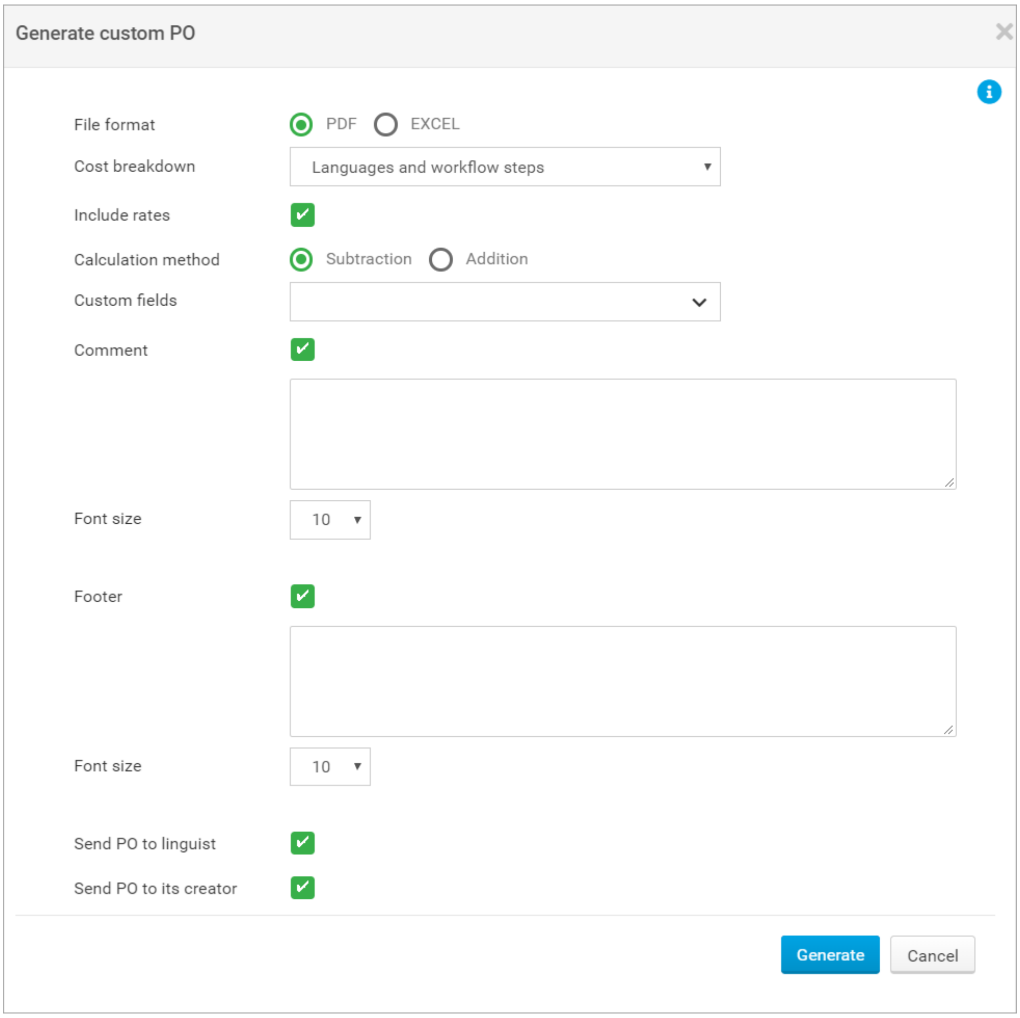
You can then generate a PO for each linguist. A popup will open where you can choose the PO file format, calculation method, and custom fields. You can decide to include rates or a cost breakdown into languages or languages and workflow steps. Also, you can specify whether the PO should be automatically emailed to the linguist, add a comment, and customize the footer and font sizes.

Generate custom PO options

File format - Select a file format for the purchase order
Cost breakdown - Choose how costs are presented on the purchase order:

- No breakdown - Costs specified on the purchase order will only include summed amounts
- Languages - Costs specified on the purchase order will be divided by languages
- Languages and workflow steps - Costs specified on the purchase order will be divided by languages and workflow steps

Include rates - Select this option to include rates from the translator's rate card. The option is only available when the cost breakdown is set to languages and workflow steps.
Calculation method - Select whether costs included in the purchase order should be calculated by adding costs of all word matching categories or subtracting them from the overall sum.
Custom fields - Multiple custom fields can be listed on the purchase order.
Comment - Select this option to add a comment. PO comments can be specified in customer or global system settings or manually in the comment input field.
Footer - Select this option to add a footer. PO footers can be specified in customer or global system settings.
Send PO to linguist - Select this option to send the purchase order to the linguist.
Send PO to its creator - Select this option to send the purchase order to the person who created it.



Project Editor – Generating a custom PO

Time logging

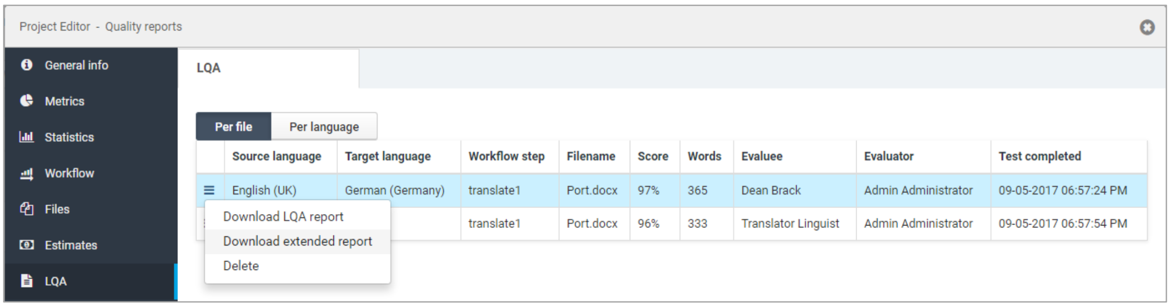
An administrator can configure XTM to log the time linguists take to perform a task automatically, or to allow you to enter the time manually. This is set on the Configuration>Settings>Projects tab.

If the time has been entered manually and there is a value for the rate per hour on the linguist's rate card, it can be used to calculate the cost of performing the task.

Project Editor – LQA

LQA evaluations performed on a project are recorded on the LQA tab. The tab provides comprehensive data about the evaluation including language combinations, workflow steps, filenames, scores, numbers of words, linguists whose translation was evaluated, the evaluating linguists and dates.

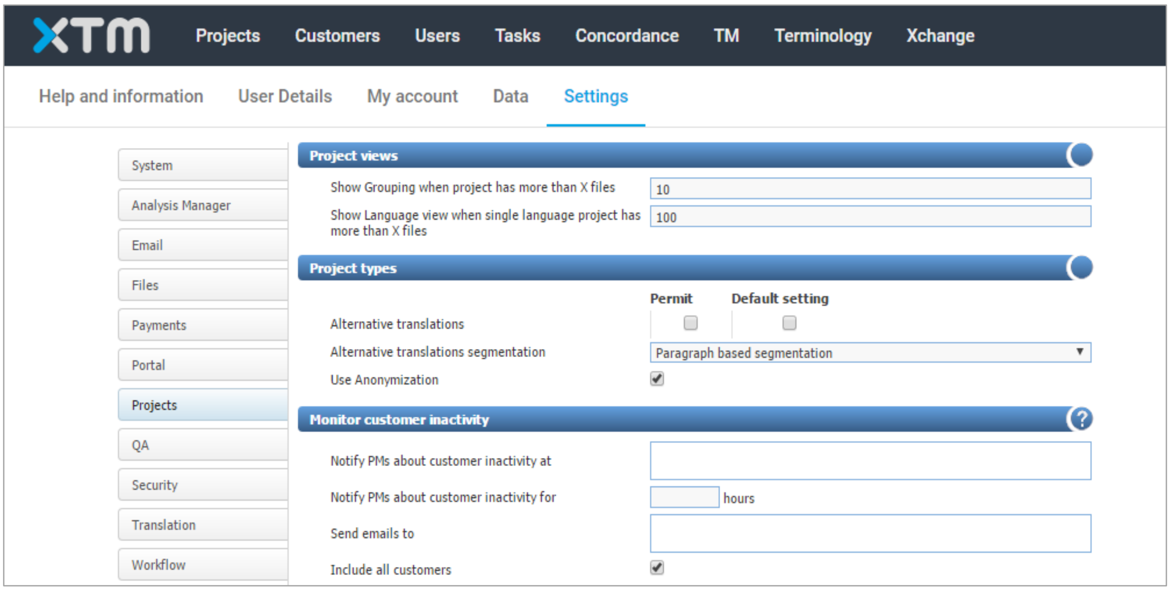
Project managers have an option to download the LQA reports and extended reports in an Excel file or remove an item from the list. In addition to the standard LQA report contents, the extended report includes the list of errors with their category and severity for each segment. The reports can be download per file or per language.



Project Editor – LQA

Project Editor – Groups

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

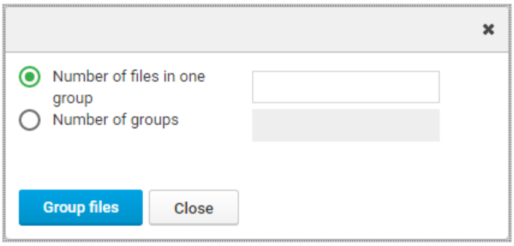


Setting the number of files in a project when Grouping and Language view are visible

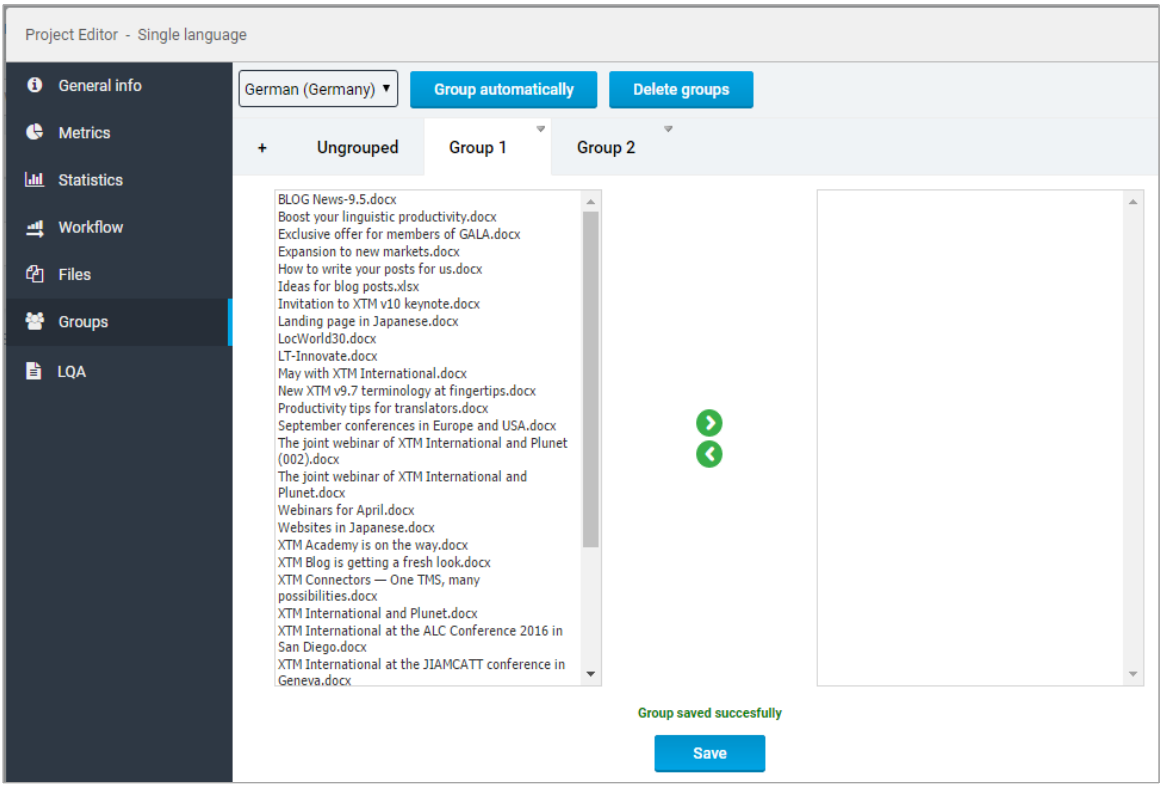
Additionally, if you have a single language project with many files you can also manage the project at a language level rather than at a file level. The number of files in a project when this is visible is set in a similar way.

To create groups and allocate the files to a group Select the groups tab.

1) Either select a specific language from the “Choose the target language” menu or leave it as “All languages”.
2) To let XTM automatically group the file select the “group automatically button”
3) In the pop-up window select whether you want to group by the number of files in a group or the number of groups, then enter the required value in the relevant box and select the “Group files” button.
4) To manually create the groups, I the lower section Select the plus tab. Then Select the tabs that appear and move the files from the left-hand ungrouped files box to the right-hand box. Select the Save button for each group before moving to the next.
5) To delete a group, Select the small triangle on the group tab and select delete from the dropdown menu.

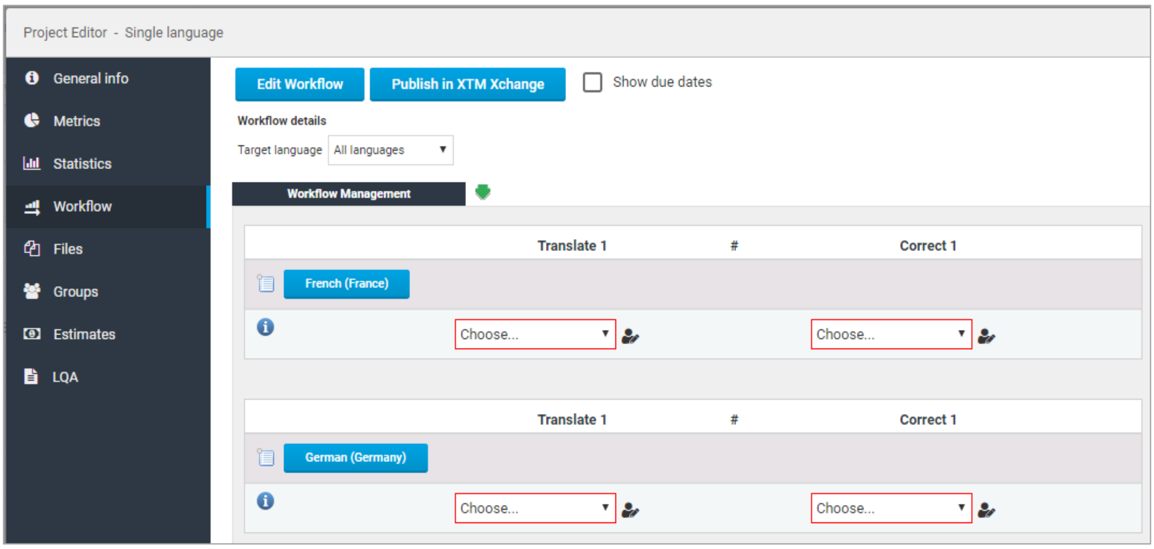


Setting the automatic grouping



Creating groups and allocating files to groups.

The advantage of the Group view and Language view is that in the Workflow tab it is easy to allocate translation resources to all the files in a group or a particular language rather than to all the files individually.



A project showing the workflow in language view

Configuration

User Details

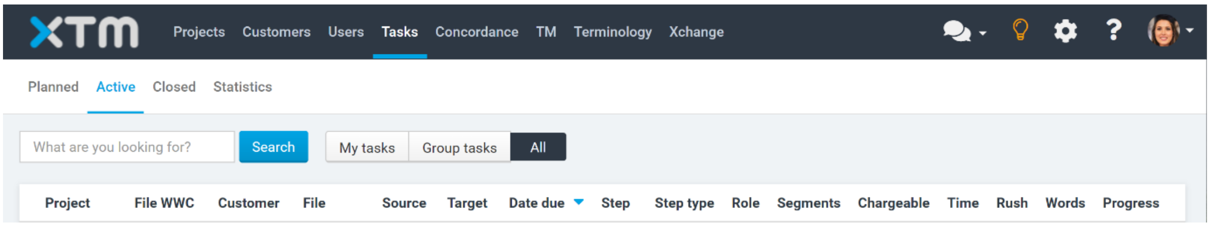
Select the configuration icon from the main menu bar to access User details.

In the User details tab, you can:

- change your password
- update your personal details
- change the interface language
- set your availability for work

5. Tasks

You can find the task to which you are assigned in the Tasks tab.



Active tasks in the Tasks tab

Tasks are split into three categories:

- Planned
- Active
- Closed

For each of the task’s categories, you can check:

- Project
- File WWC (Weighted Word Count)
- Customer
- File
- Source
- Target
- Date due
- Step
- Step type
- Role
- Segments
- Chargeable
- Time
- Rush
- Words
- Progress

You can also check the Statistics in the Tasks tab.

Linguists can open XTM Workbench directly from the Tasks tab.

6. XTM Workbench

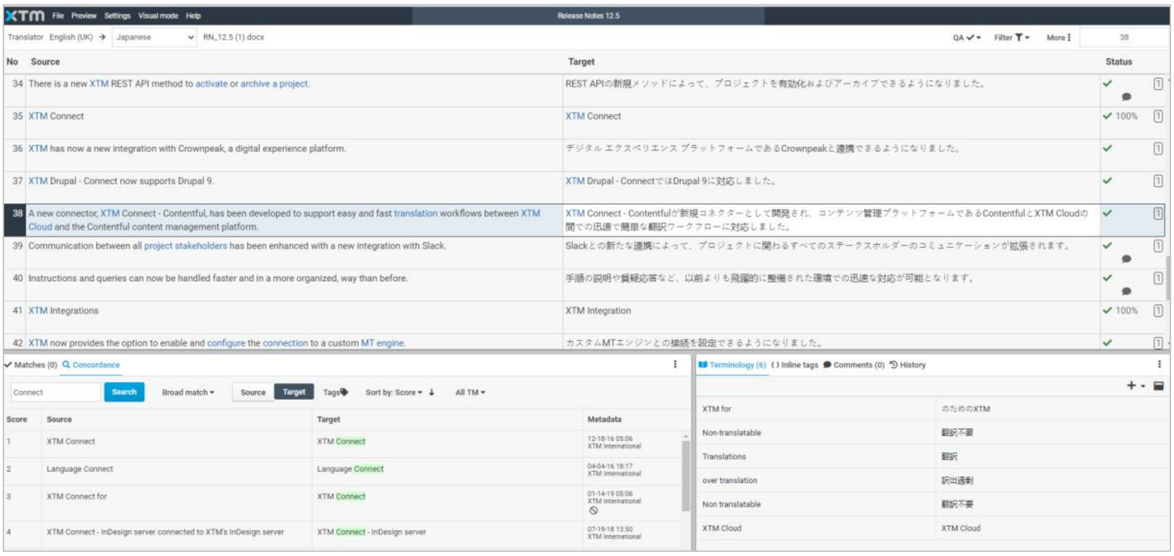
Opening the XTM Workbench

You can open XTM Workbench in several ways:

- By selecting the task link in the email notification (Linguists, terminologist)
- from the project context menu on the Project list (PMs, Administrators)
- from the file icon in Project editor > Workflow tab (PMs, Administrators)
- from the Tasks view by selecting on the project row in the table view or by selecting the corresponding option from the file context menu (Linguists)

XTM Workbench layout overview

XTM Workbench is divided into a workspace docked panels, making use of the full screen width. XTM Workbench opens in a new tab, and it is possible to open several Workbench tabs at the same time.



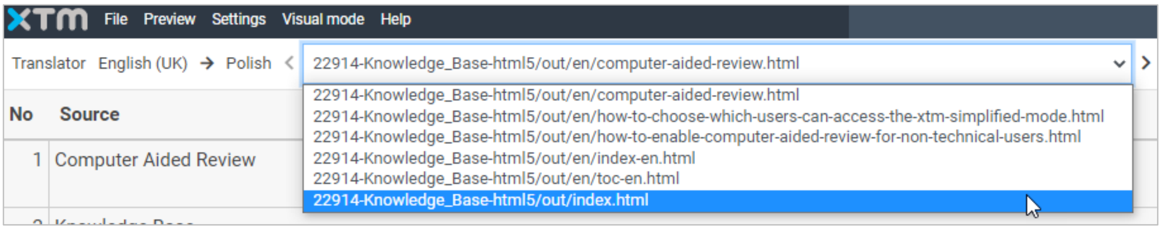
XTM Workbench: view of the workspace and docked panels

XTM Workbench title bar

The title bar displays:

- The user role assigned to that workflow step
- The source language and the target languages
- The file name(s)
- File navigator
- QA button
- Filter button
- Menu for More options
- Segment range

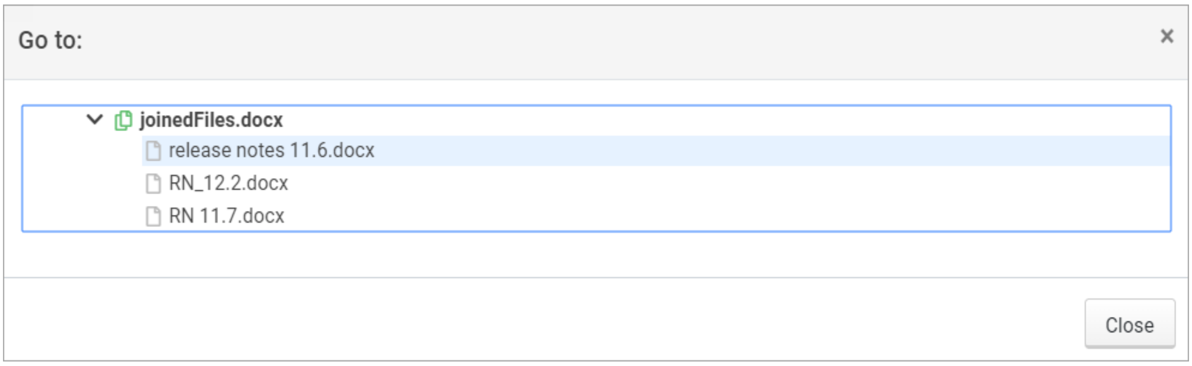
If you have been allocated multiple languages or files in the same project, you can navigate through them using the dropdown menu, the arrows to the left and right of the file name or use the File navigator button.



XTM Workbench title bar with dropdown lists of available files and languages

Navigation between joined files

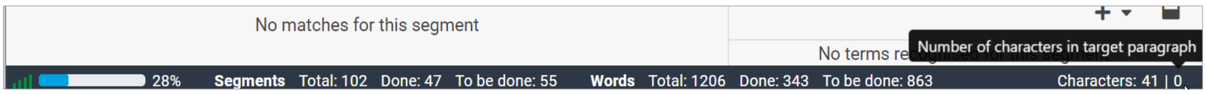
When files, such as DITA source files, are joined during project creation, you can easily navigate through them by clicking the file icon. This displays the file structure tree. The structure of the tree depends on the file join settings.



File navigator – dialog window

Progress bar

The status bar at the bottom of the screen shows the progress of work in percentages, words, characters, and segments. Another option, activated under the Settings tab, is the character counter presenting the length of the target text (per paragraph) and comparing it to the source length (useful when the “Monitor target length” option is enabled).



Progress bar

XTM Workbench workspace

XTM Workbench segments the source document into sentences and phrases. The editor displays the document in four columns, namely – from left to right:

- segment no.
- source language text
- target language text
- segment status

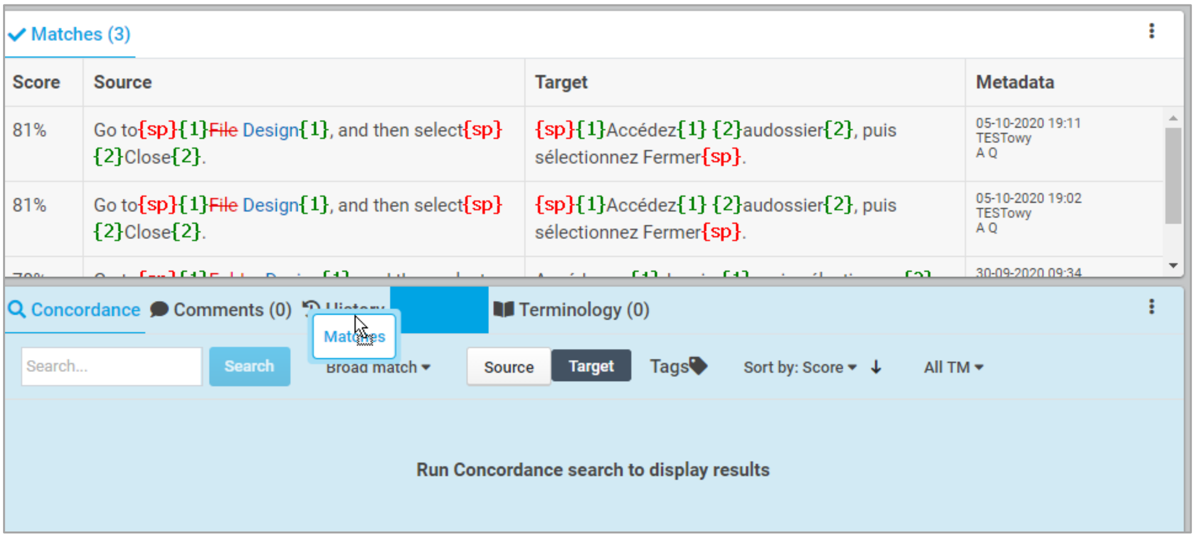
XTM Workbench workspace view

Docked panels

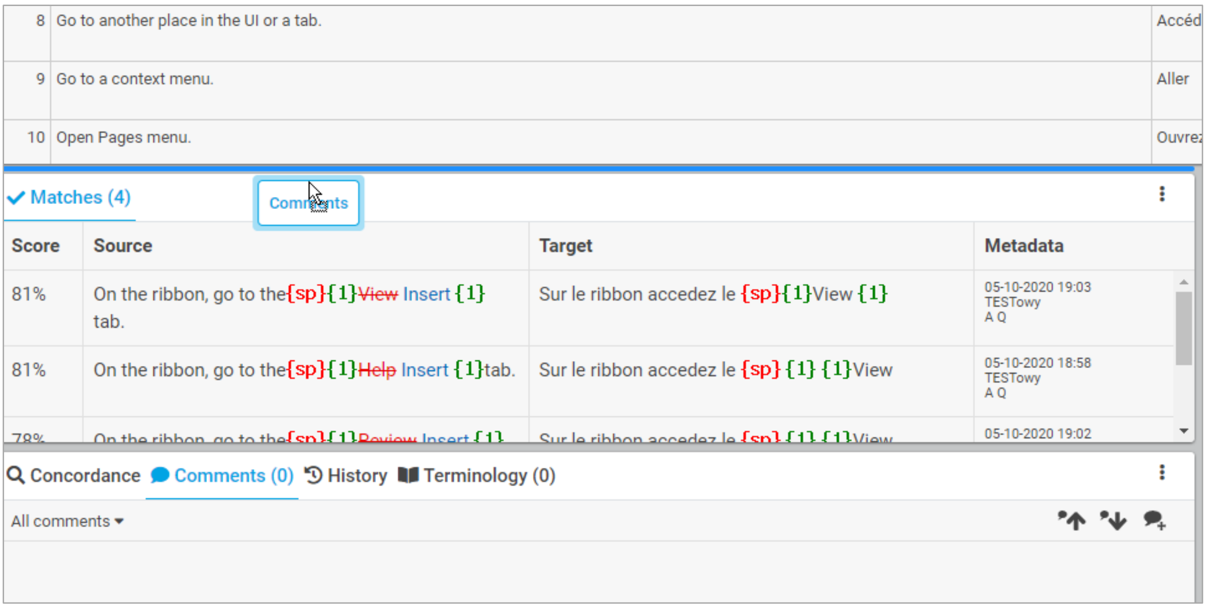
The docked panels are: Matches, Concordance, Terminology, Inline tags, Comments, QA, and History. For an optimal user experience the panels can be rearranged and resized according to the user preference.

Drag and drop

The “drag and drop” feature lets you dock the panels in any place on the bottom of the XTM Workbench space or group several panels into one. Select the header of the docked panel you wish to drag into a different place and move it to the desired location. The area where you can drop your docked panel will turn blue. Then drop the panel. Your arrangement of the panels will be remembered and next time you open the XTM Workbench you will not have to move the panels again. The height and width of the docked panels is easily adjustable by selecting and dragging the top padding of the panels.



Dragging and dropping the Matches panel – the area where the panel can be dropped turns blue



Dragging and dropping the Comments panel as a separate panel – the area where the panel can be dropped turns blue

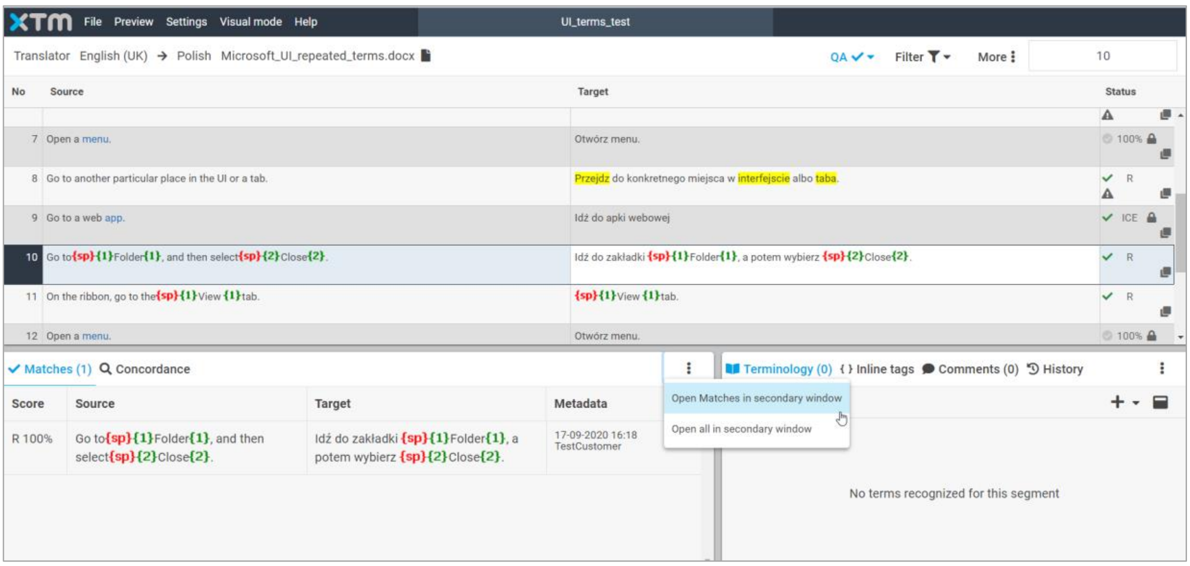
Main and secondary windows

The standard default view of the docked panels in the main XTM Workbench window is presented below – two panes: one comprising Matches and Concordance panels (and optionally LQA), the other one comprising Terminology, Inline tags, Comments and History docked panels. However, docked panels can be opened in another browser window – the so-called secondary window.

The default arrangement of docked panels

XTM Workbench offers two ways of moving the docked panels to the secondary window. Under the menu in the selected panel choose if you want to open:

- all panels arranged in a given pane "Open all in secondary window", or
- each panel individually (Open [*docked panel name*] in secondary window).

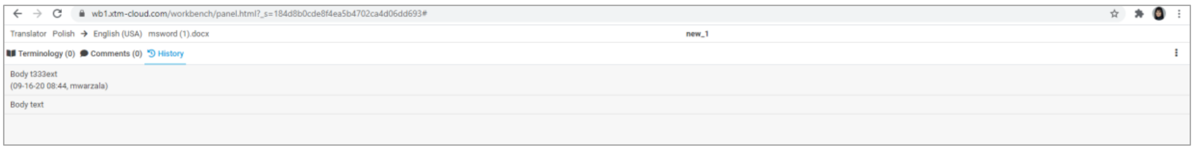


Opening docked panels in secondary window – menu

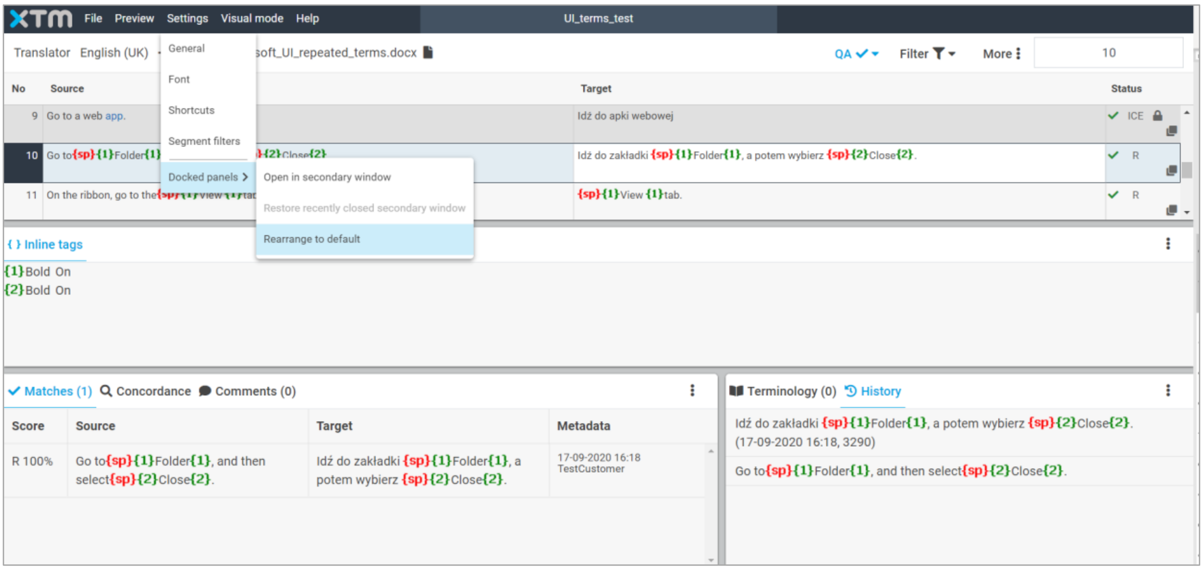
XTM Workbench remembers your custom view also after closing the secondary browser window. If the secondary window is closed, all panels return to their location in the main window in the same arrangement they were before they were moved to the secondary window.

The option “Restore recently closed secondary window” under Settings > Docked panels lets you quickly restore the panels back to the secondary window The option is available for the duration of the current XTM Workbench session or until the browser page has been reloaded.

To restore the standard default layout, go to Settings > Docked panels > Rearrange to default.



Docked panels opened in the secondary window



Restoring the docked panels to their standard, default arrangement

Working in XTM Workbench

Navigating within the document

XTM Workbench offers automatic loading of segments, which means that a pre-set number of segments will be displayed at a time. You can configure the number of displayed segments under the Settings tab. Segments are loaded automatically once you move upwards or downwards from one segment to another. Scrolling the page, whilst remaining in the active segment, will load additional segments. Once you scroll the page and reach the end of the loaded set of segments, irrespective of the scrolling direction, a message will appear on a blue ribbon: “Activate one of the visible segments to load more segments”.

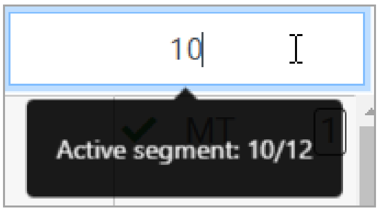
Note: When determining how many segments to display on the page, remember that when you have a page open, other translators, reviewers or correctors can view it. However, they will find that all the segments on the page are locked, and they will not be able to make any changes.

You can also choose whether you want to scroll the editor automatically by clicking a segment or by using keyboard shortcuts or by both methods. The segment you place your cursor in is centered.

How to set the number of segments displayed in XTM Workbench

1. In Workbench, go to Settings > General.
2. Scroll down to XTM Workbench window > Displayed segments.
3. Select the number of displayed segments.

You can move to any segment by entering the segment number in the empty box in the title bar and by selecting “Enter” to approve your selection. This means that you will be immediately taken to the segment you have entered in the box, while the segment itself will be centered.



Navigation box at top of the page

Matches

XTM Workbench displays matches in the docked panel. They are ordered by the type of match and then by the date created or changed. The order is as follows:

1. Exact match (ICE),
2. Leverage match 100%,
3. Repetitions,
4. TM Fuzzy matches
5. Internal Fuzzy matches (in score order and then in date order)
6. MT matches.

The Matches docked panel

Hover over the Metadata column to display:

- Customer – name of the customer
- Project – name of the project
- Database ID
- File – name of the file
- Date created – date on which the project was created
- Date modified – the last date a segment was changed
- Created by and Modified by
- Source and target languages
- Segment status
- XLIFF:doc status, if any

Updating matches

XTM has integrated Translation Memory (TM) and Terminology Manger modules to allow creating, maintaining, and updating translation memories and term bases. All sets of TM assigned to a project are updated in real time as the translators move from segment to segment. Any changes made to the TM are immediately updated and accessible to all users with appropriate role and rights. During the updates, not only new terms and matches can be obtained, also missing metadata for existing matches and terms are provided.

There are several rules of how and when TM matches and terms in a segment are updated in XTM.

Whenever a user:

- enters a target segment, the active segment and the next two segments are updated,
- edits or deletes a TM match in the target segment, the segment is updated,
- adds a term to Terminology or edits an existing term in a segment, the segment is updated.

Machine translation matches are updated whenever a user:

- enters a target segment, the active segment and the next two segments are updated,
- merges or unmerges a segment with its preceding segment – both segments are updated.

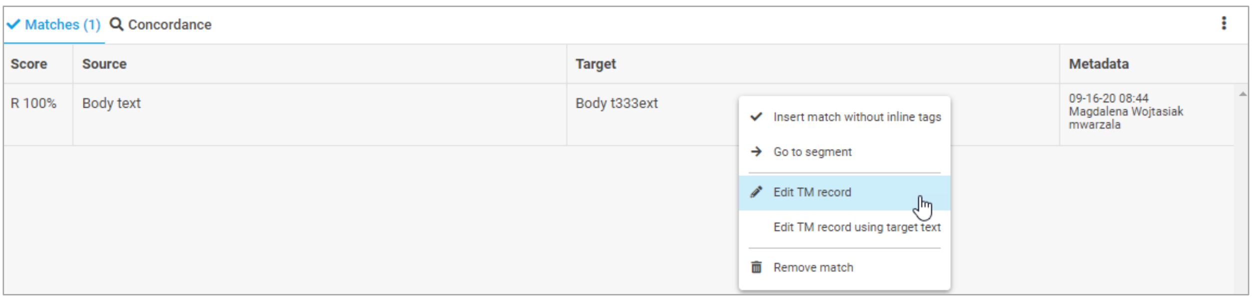
MT matches will never be updated in the following cases:

- segments are in the read-only mode,
- segment has been merged with a preceding segment,
- segments contain alternative translations,
- segments are locked,
- segments have been excluded from translation with the use of an MT engine as part of an analysis configuration provided by XTM Support Team,
- The "Do not search for an MT match when one of the selected matches exists" option has been checked in the project settings; as a result, segments have a match blocking MT translation.

Managing TM matches in the Matches docked panel

Linguists with additional TM management rights can edit or remove TM matches directly from the Matches docked panel.

Right-click the match of the target segment you wish to edit and choose one of the options: either edit the TM record or edit the TM record with the translation already provided in the target segment. With the Go to segment option you can move directly from the TM match to the corresponding segment in the project.



Options of editing TM entries in the docked panel

Repeated segments

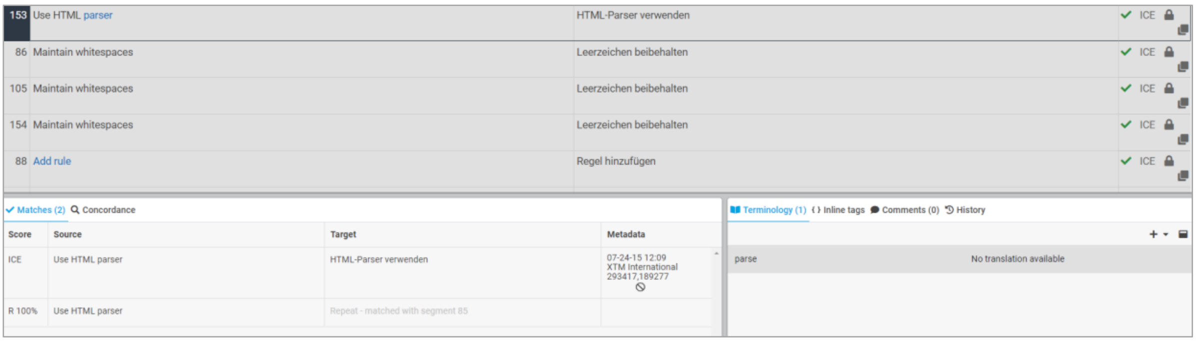
XTM continually checks the TM database and updates the matches displayed in XTM Workbench. This is particularly important for repeated segments. In such cases, XTM identifies repetitions during project creation so that when the first instance of the repeated segment is translated, this translation will be propagated throughout the document to all repeated segments as they appear in the workspace.

There is an icon in the status column of repeated segments that identifies them. Clicking on it allows you to perform two actions:

- **Go to first repeated segment** – takes you to the first instance of a repeated segment,
- **Filter repeated segments** – activates a filter which displays all the segments with repetitions found in the document

Drop-down menu with filters under the Repeated segment icon in the status column

Finally, repeated segments are displayed by default as Matches in the docked panel. Selecting the tick icon in the target section automatically applies the translation. Repeated segments are marked with the letter “R” in the Score column.



A repeated segment – docked panel view

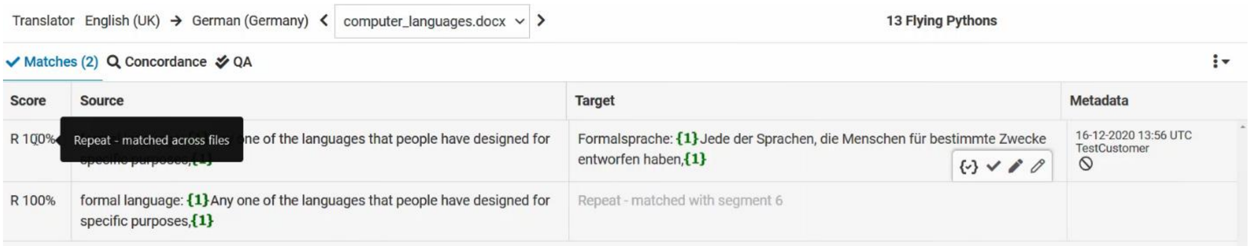
Project and file repetition

In XTM Workbench you can distinguish between the project and file repetition in the Matches docked panel. Repetitions are marked R 100% in the Score column of the Matches docked panel.

To insert repetitions:

1) Go to the Matches panel. Hover over the Score column on the left
2) File repetitions are marked Repeat - matched with segment (number of the matched segments). In the target column, select the check icon to insert repetition or the check in brackets icon to insert repetition with inline tags.
3) Project repetitions are marked Repeat - matched across files. In the target column, select the check icon to insert repetition or the check in brackets icon to insert repetition with inline tags.

Matches panel: Repeat - matched with segment



Matches panel: Repeat - matched across files

Updates of edited repeated segments

Repeated segments can be managed from several places in XTM Workbench depending on whether actions performed on them are one-off segment-specific actions or global actions.

XTM always checks if the segment you are working on is repeated in your file. If yes, it automatically places the same translation in all identical segments. If translations in any repeated segments are edited, you can configure the way repeated segments are updated by choosing one of the following options:

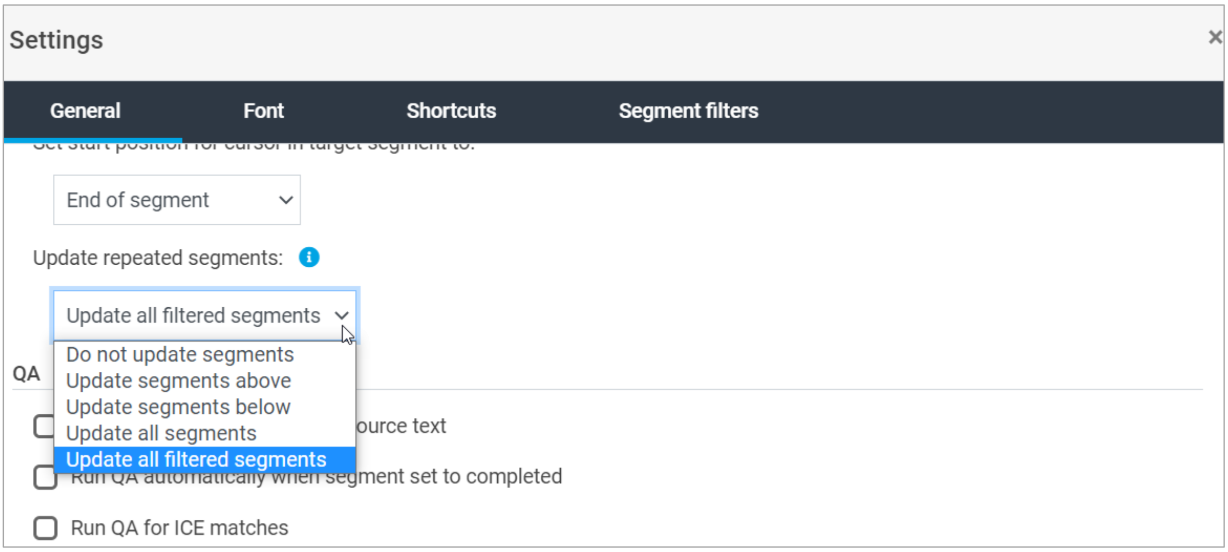
Do not update segments – does not overwrite translations in repeated segments
Update segments above – overwrites translations in repeated segments only above the edited segment
Update segments below – overwrites translations in repeated segments only below the edited segment
Update all segments – overwrites translations in all repeated segments
Update filtered segments – overwrites translations only in filtered repeated segments. If no filter is active, all repeated segments will be updated.

There are two ways to approach the update of filtered segments:

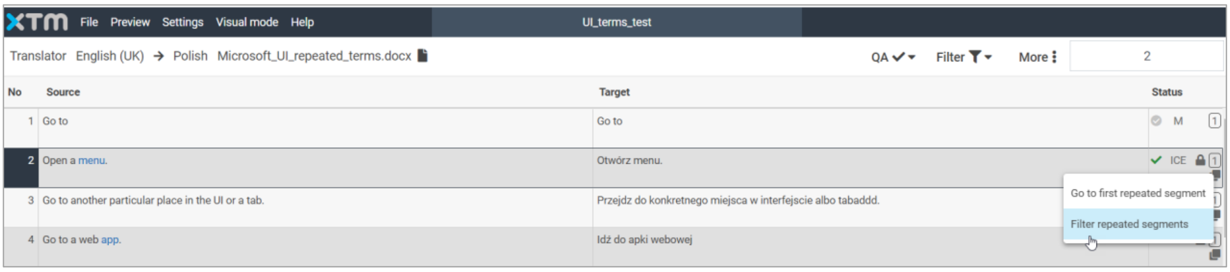
1) on the system level by applying settings to all filtered segments under the General tab
2) on the segment-by-segment basis from the context menu.

To update all filtered segments:

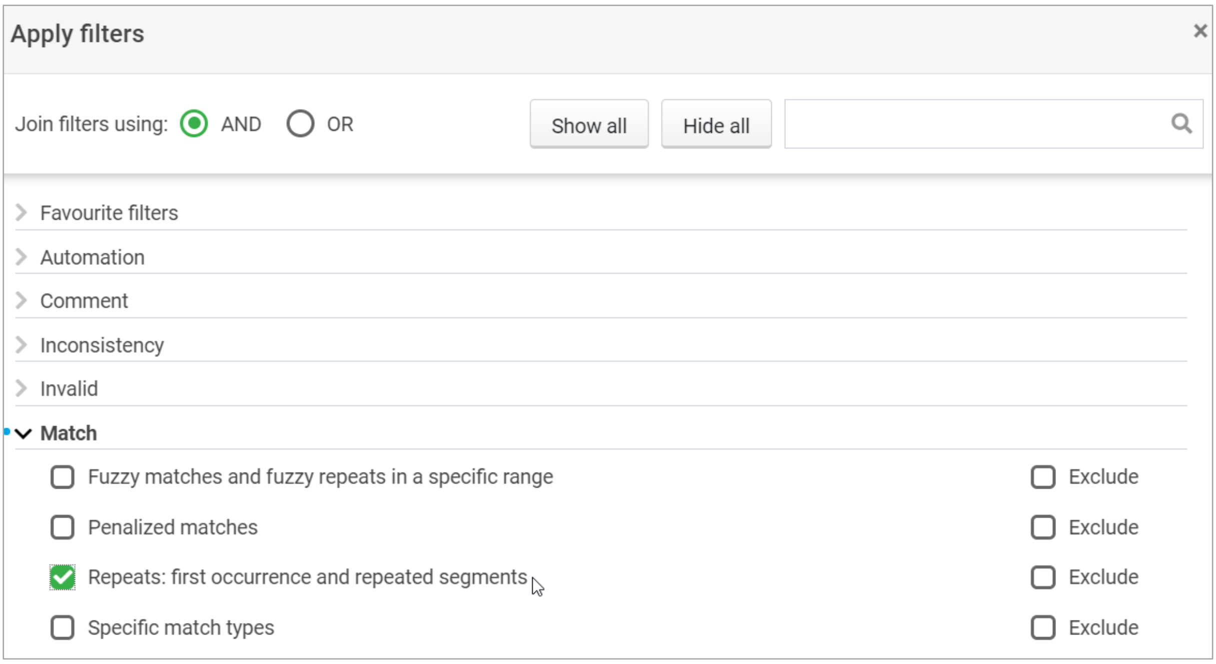
1. Go to Settings > General > Update repeated segments and choose Update all filtered segments from the dropdown menu.
2. Save your changes.
3. Filter repeated segments either by selecting the two-squares icon in the Status column or applying the Repeated segments: first occurrence and repetition segments under the Filter icon
4. Edit one of the filtered segments and leave the segment. All filtered segments will be modified automatically.



Settings > General > Update repeated segments



Filter repeated segments – segment view



Repeated segments: first occurrence and repetition segments under the Filter icon

All filtered segments modified automatically

With the option to update all filtered segments, users can still decide whether to have them updated on the segment level from the context menu.

QA docked panel

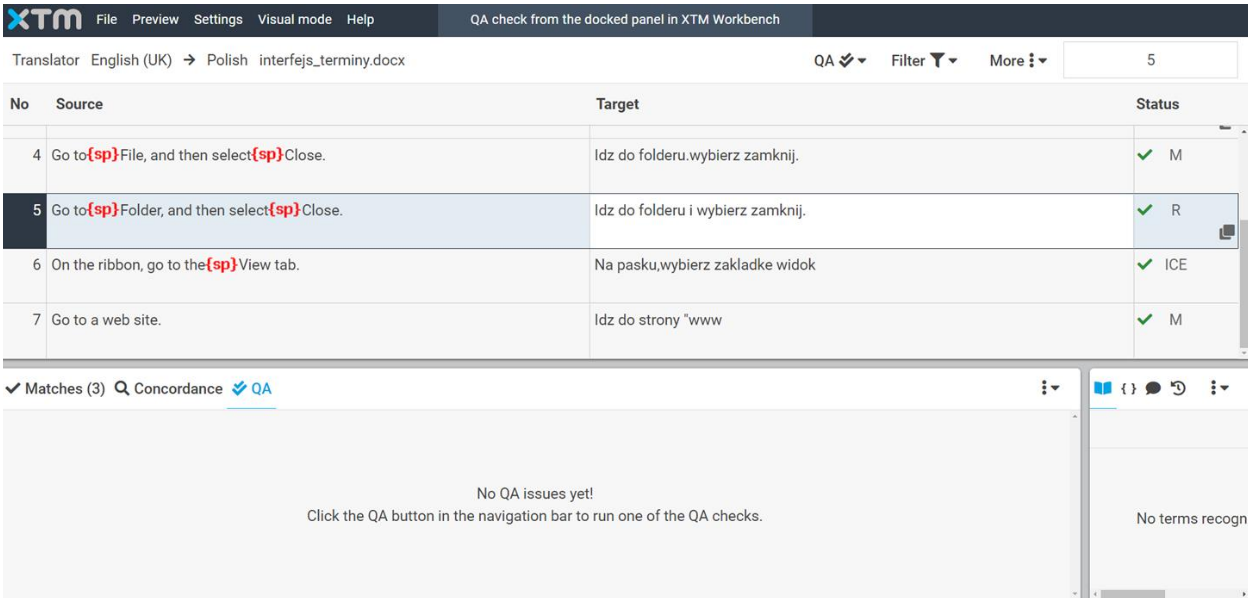
You can access and manage all QA warnings from within the QA docked panel in XTM Workbench. The QA panel enables you to speed up the review process by processing multiple warnings such as spelling issues in one go.

How to run a QA check

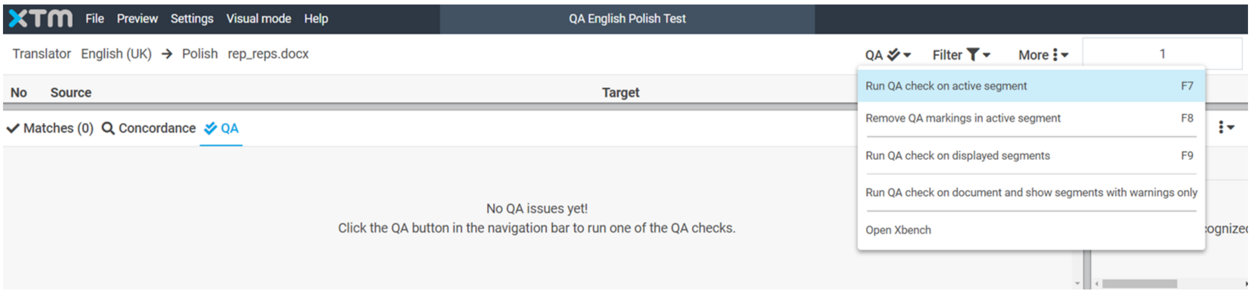
1) Select the QA button in the navigation bar in the top-right corner. Choose from the available options:
   a. Run QA check on active segment
   b. Run QA check on displayed segments
   c. Run QA check in document

2) The QA warnings are displayed in the QA panel, including the information about segment number, warning category and issue description.
   Select the warning to activate the segment it relates to. A checkbox next to a warning indicates that it is possible to take an action.
   Hover over the warning in the QA panel so that it is highlighted in blue. You can ignore the warning by selecting the x at the end of the line.

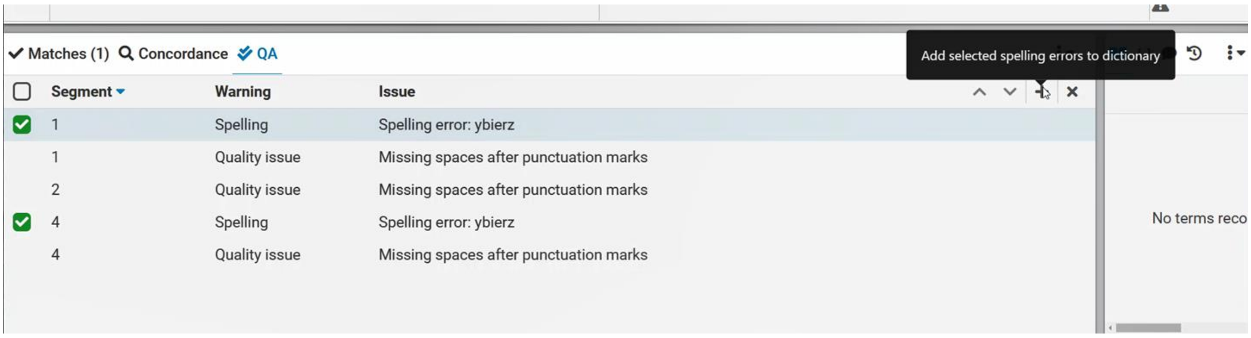
3) Select multiple checkboxes. Select the + sign in the top right corner of the QA panel. Click on the Add selected spelling errors to dictionary in the popup.



XTM Workbench QA docked panel



Running QA check from the navigation menu



QA warnings in the QA docked panel

Terminology in XTM Workbench

Inserting terms to target translations

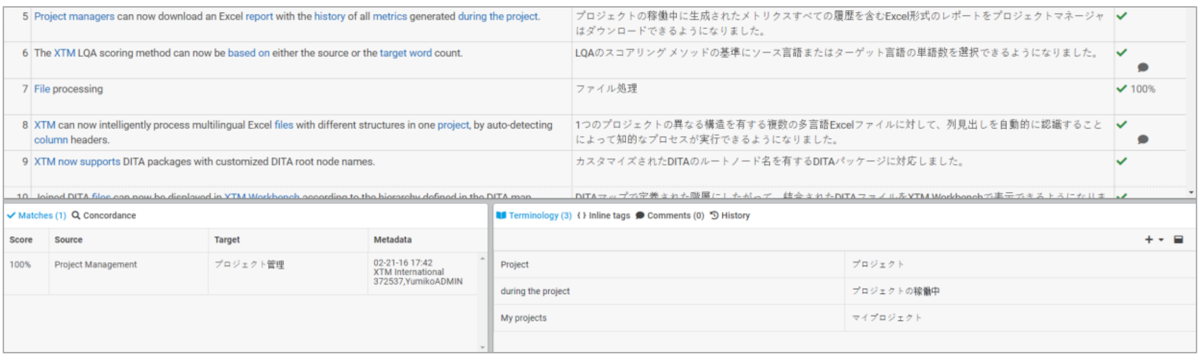
How to insert a term into the target segment from the Terminology docked panel:

1) Select the target term you want to insert into the target segment and right-click it to open a context menu.
2) Choose Insert into segment.
3) The term will be automatically placed in the target segment.

Inserting terminology into target segments – docked panel view

Terminology recognition

XTM Workbench can display all source terms recognized in an active segment together with their translations for the target language. The figure in brackets in the Terminology tab indicates the number of terms recognized in the active segment.



Terminology recognition window in the docked panel

Adding terms to Terminology

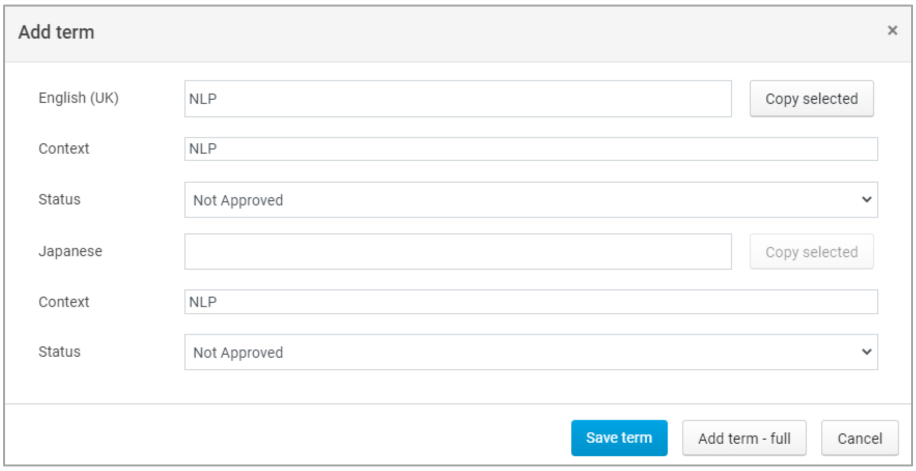
There are two ways to add terms to the Terminology base: from the context menu and from the docked panel.

Context menu:
To add a term quickly while working in XTM Workbench:

1) Highlight the term or phrase you want to add to Terminology.
2) Right-click it to display the context menu.
3) Go to Terminology and choose Add term - quick to open a popup window.

Adding terms from the context menu with a term highlighted

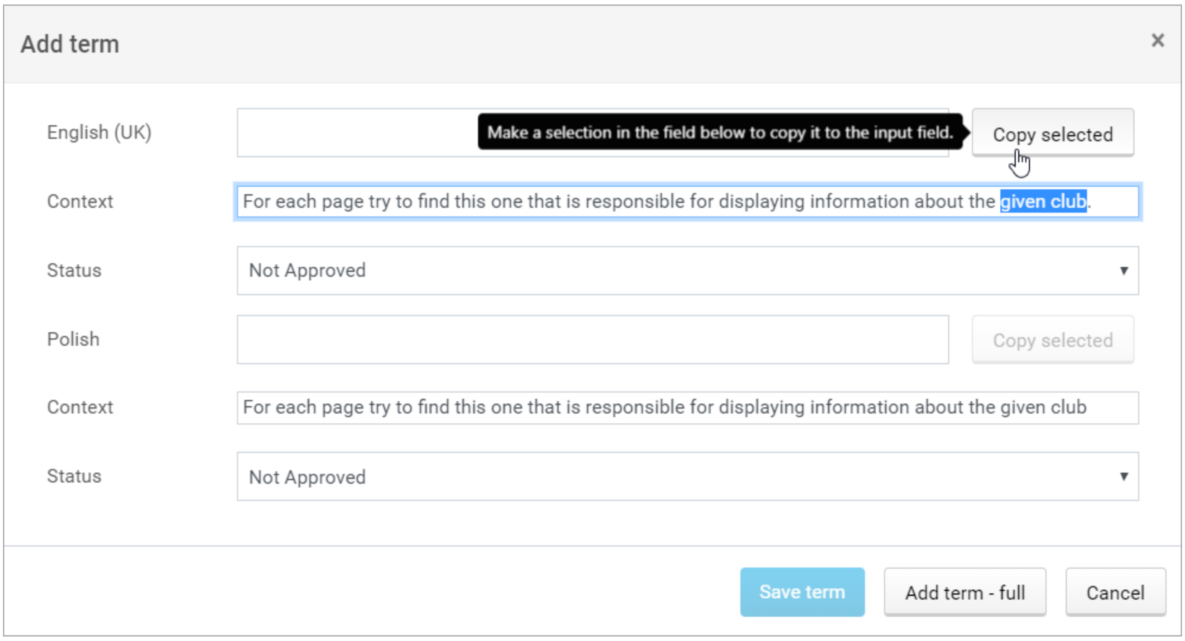
The popup appears with the term you highlighted. Here, you can provide the context both for your term and its equivalent in the target language. The status option allows you to assign status to terms: Forbidden, Not approved, Rejected, Valid. To finalize the action, select Save term.



Adding a term – providing context and status

You can also add terms without highlighting them in the segment:

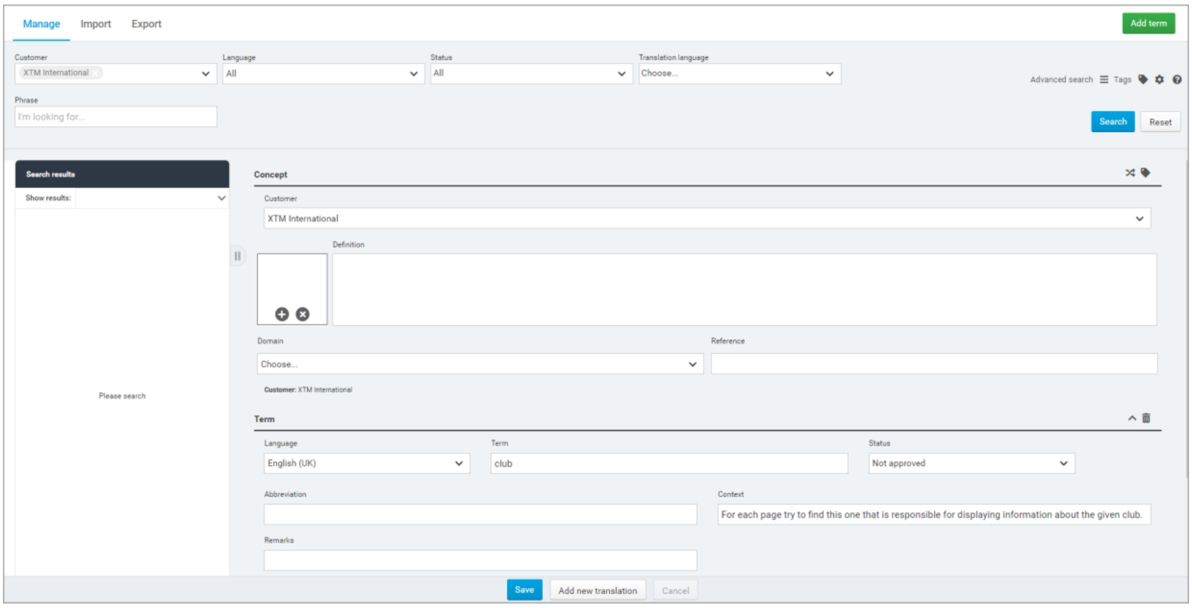
1) Right-click the segment from which you want to add a term.
2) Go to Terminology and choose Add term - quick to open a pop-up window.
3) Highlight the selected term in the Context field.
4) Select Copy selected to insert the term into the source language field.
5) Repeat the same sequence of actions for the translated equivalent.
6) Select adequate translation status.
7) Select Save term.



Adding a term – providing the term from the context field

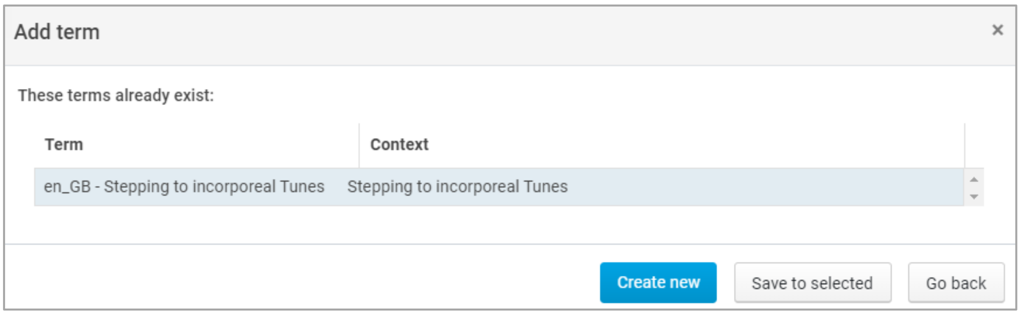
Context menu: Add term - full

To add term from the Terminology window and to provide more detailed information about the term, highlight a term and choose the Add term - full option. The Terminology window opens and you can enter term-related data in all the fields.



Terminology window – adding full details of a term

If you are trying to add a term which already exists, a warning will appear notifying you that the term had already been added to the Terminology base. You can still choose to create a new entry.



A term already exists notification

The Add term - quick and Add term - full options can also be accessed from the docked panel under Terminology.

Adding terms to Terminology – docked panel

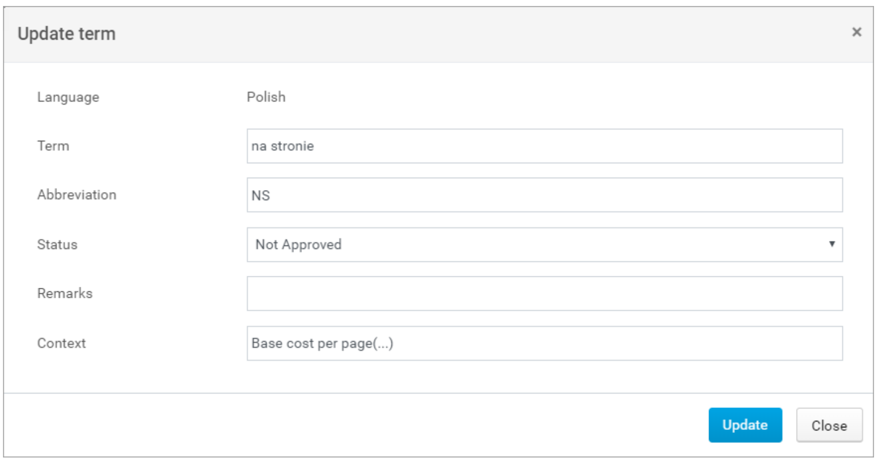
Editing terms in Terminology

If a term already exists in Terminology, but changes need to be made, you can introduce them from the context menu or from the docked panel.
To edit terms from the context menu:

1) Left-click the term in blue.
2) From the drop-down menu choose Edit term to open a pop-up window.
3) Make the necessary changes and select Update.

Editing terms from the context-menu editor

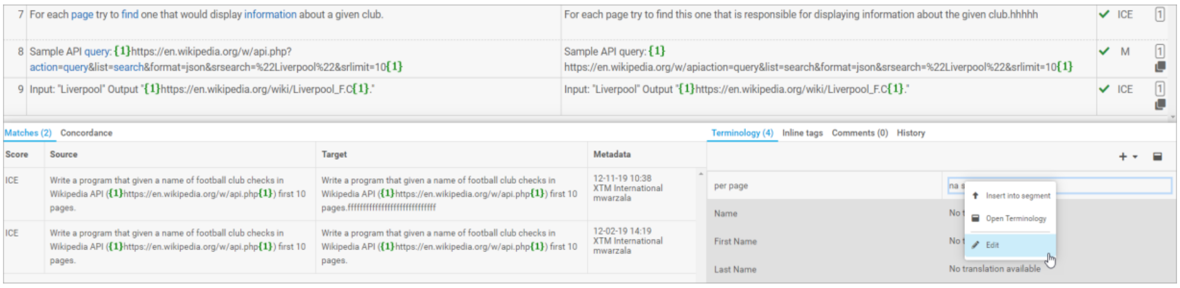
The Update term pop-up window lets you change the translation, its status and context. You can also add abbreviations and remarks.



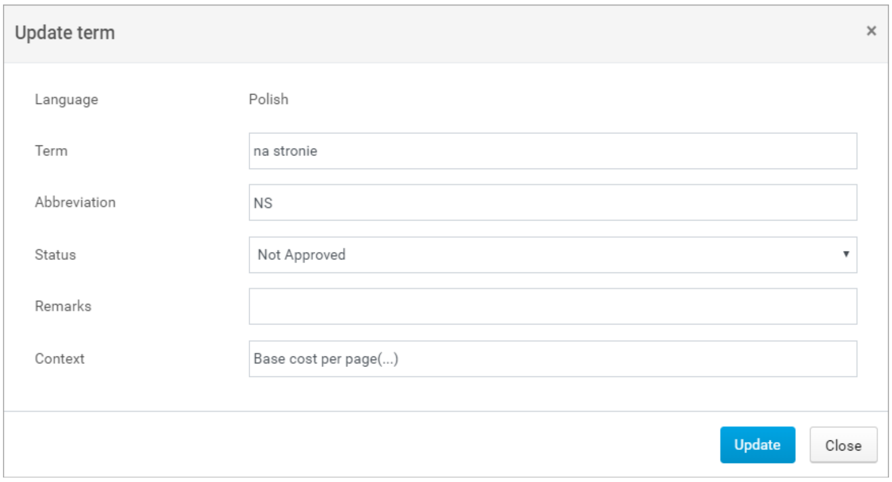
Update term pop-up window

To carry out the same action from the docked panel:

1. Go to Terminology, place the mouse cursor on the target term and right-click it.
2. From the drop-down menu choose Edit to open a popup window.
3. Make the necessary changes and select Update.



Editing terms from the docked panel Terminology



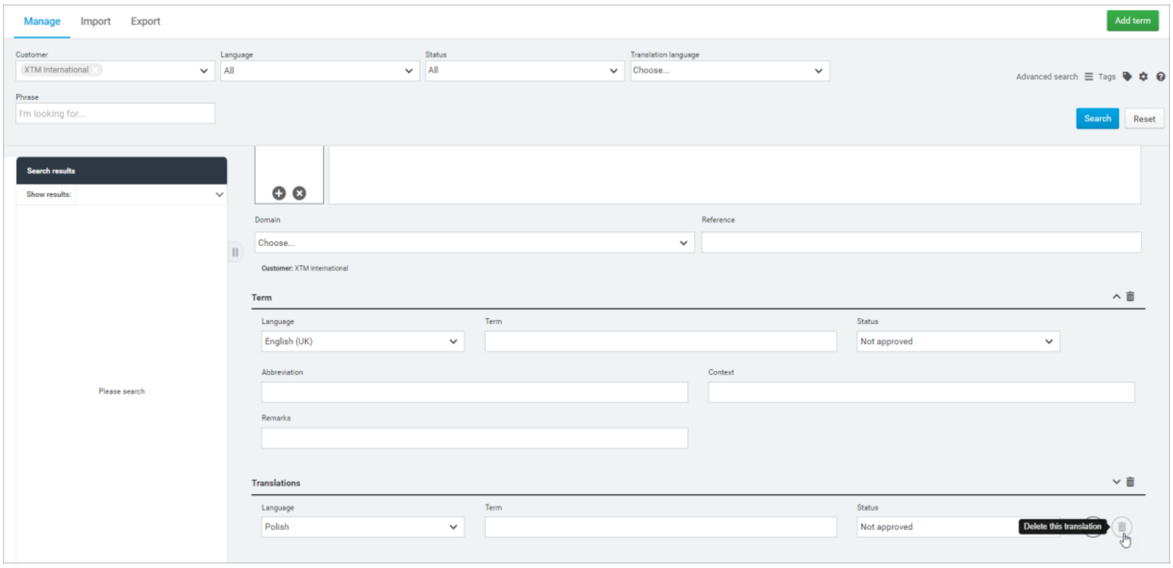
Update term pop-up window

Removing terms from Terminology

To remove a term from Terminology:

1) Go to Terminology in the docked panel.
2) Place the mouse cursor on the target term and right-click it to open a drop-down menu.
3) From the menu choose Open Terminology.
4) The Terminology window opens as a separate window where you can delete unnecessary terms.

Deleting terms from Terminology



Deleting a term in the Terminology window

Note: If you left-click the term in the Terminology, you can see metadata for the term, e.g. context, date modified, and name of the person who was the last to make the entry.

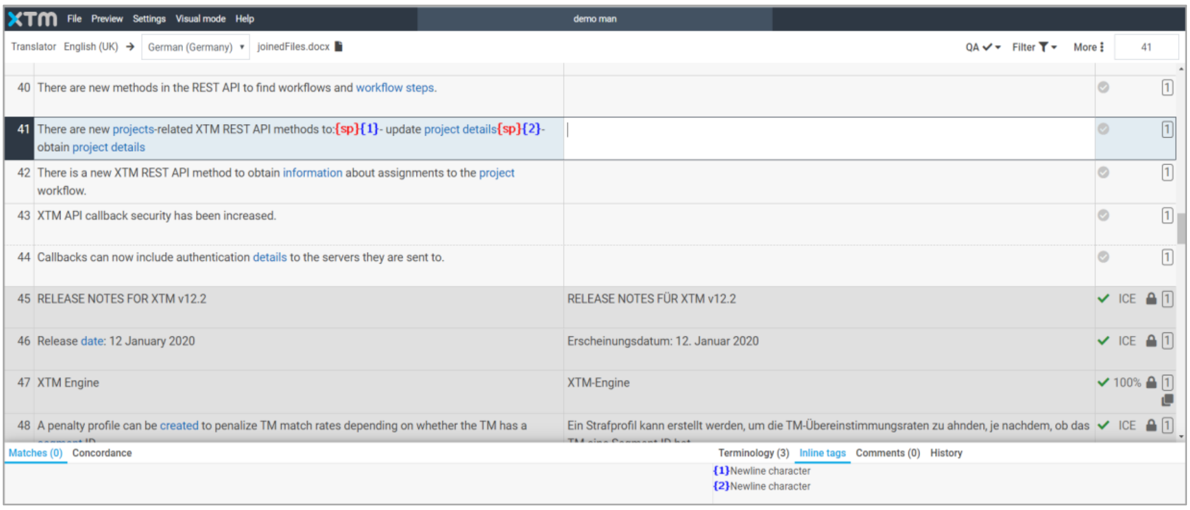
Inline tags

XML contains elements that – depending on the configuration of XTM – can be treated as text elements for translation or inlines representing formatting such as bold or italic. XTM converts the inlines to inline tags which are displayed in XTM Workbench as numbers in curly brackets such as {1}. The inline tags in the source text need to be placed in the translated target text.

There are three types of inline tags in XTM Workbench that appear in the source text. Generally, it is recommended to insert them into the target text in the same order as they are in the source text. However, you can modify the order of inline tags provided that the sequence of opening and closing tags is correct.

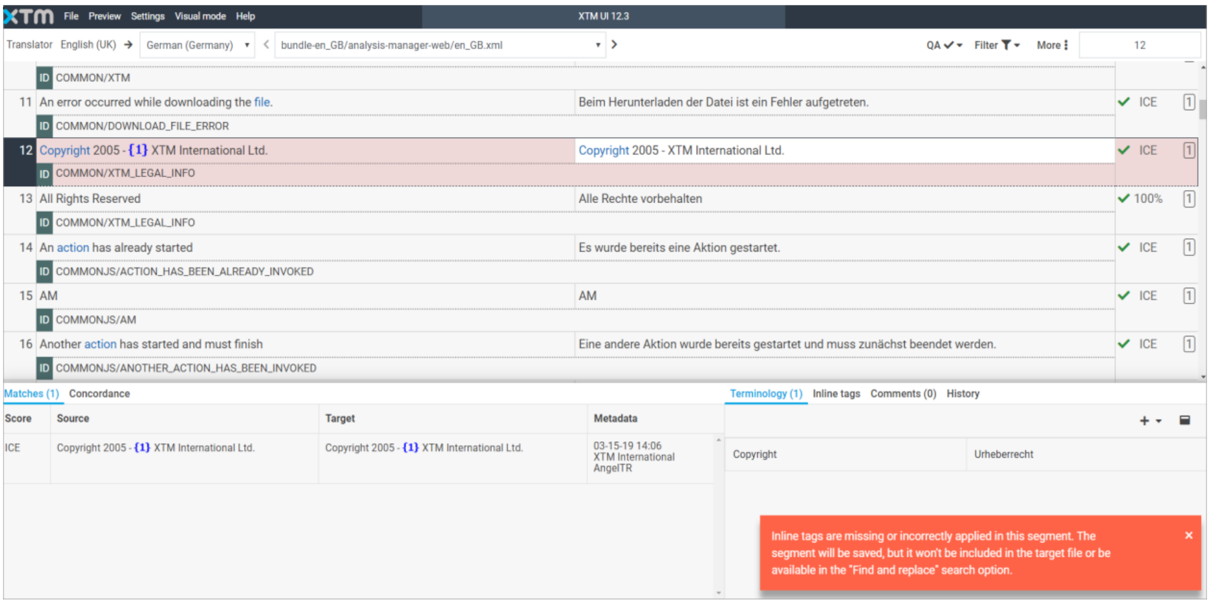
{1}	represent text formatting, e.g. bold, italics, etc.; an opening and closing tag are required: **{1}***content***{1}**
{1}	represent non-translatables, anonymized elements, or HTML elements; they appear as single tags.
{sp}	represent atypical spaces or special characters; they appear as single tags

When the source document is a Microsoft Word file, and the option to display hints about inline tags is enabled, XTM Workbench shows the meaning of the tags in the docked panel.



A segment with inline tags and their explanation in the Inline tags docked panel

If you are missing any inline tag in a segment, but try to validate it nevertheless, the segment will be highlighted in red and a warning message will appear at the bottom of the page. If you do not correct the number of inline tags, the segment will be saved, but the translation will not be used when the target document is generated, or it will not be available in the Find and replace option.

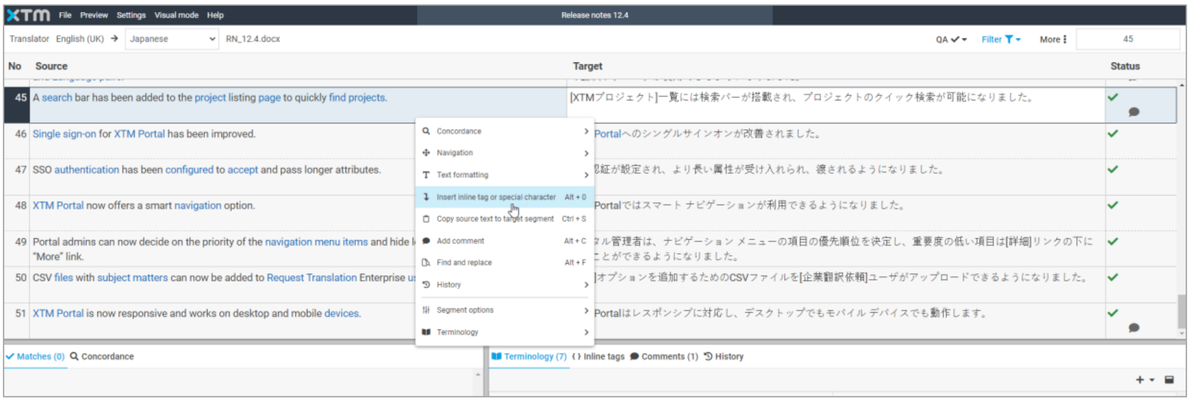


A segment with missing inline tags and a warning message

Inserting inline tag

You can insert inline tags into target segments from the context menu:

1) In the target segment, place the mouse cursor in the location corresponding to the location of the inline tag in the source segment.
2) Right-click the target segment to open the context menu.
3) Choose Insert inline tag or special character to open the Inline tags or special character pop-up window. Alternatively, you can use the shortcut Alt + number on your keyboard (from 1 to 9; for numbers 10+ use the Alt+0 shortcut and choose the inline from the Inline tag or special character pop-up window).
4) Validate the segment with the Enter key.



Inserting inline tags from the context-menu

Auto-inserting inline tag

With the Auto-insert inline tags option enabled in the system Settings (Settings > Translation > Workflow and access > Inline tags), whenever inline tags are missing or are incorrectly inserted, you can have your inline tags fixed automatically. The system will propose the inline tags which should be entered into the target segment and the user may accept them or reject them and insert their own.

From the XTM Workbench settings, you can choose to have the inline tags inserted automatically when there are no inline tags inserted or the inserted inline tags are invalid or disable the option completely.

Accepting auto-inserted inline tags

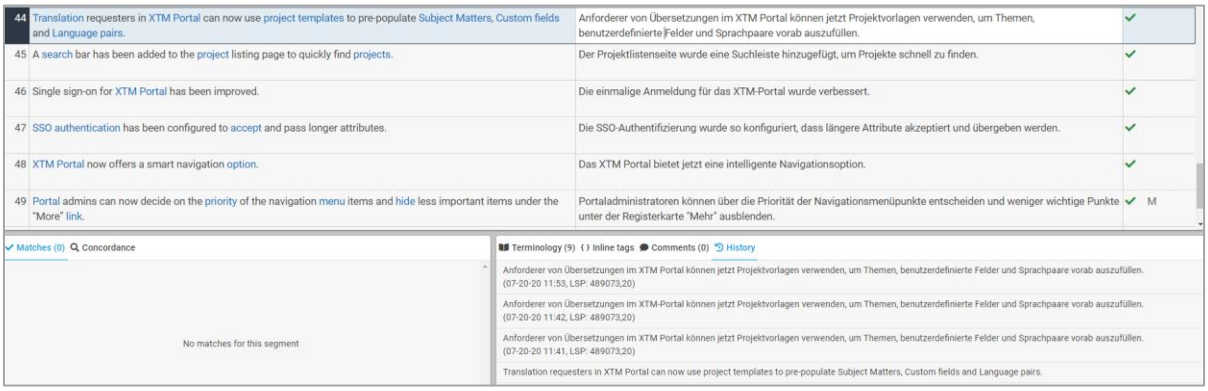
History

Saving, versioning, and restoring

Every change that you make in a segment is automatically saved when you click away from the segment. XTM automatically stores a full version history of each segment. There are two storage mechanisms:

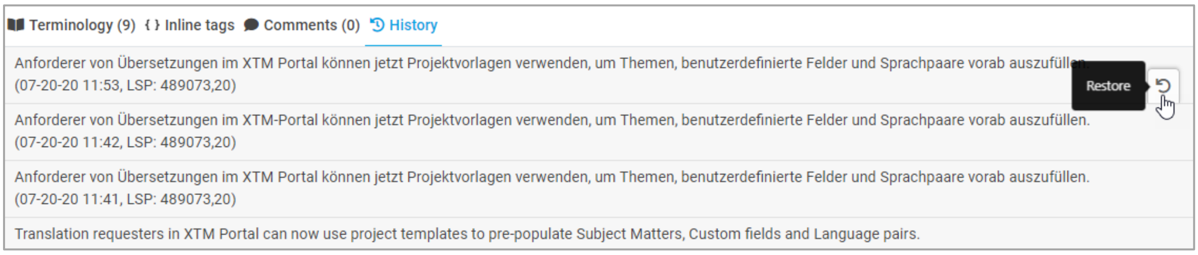
1. The changed segment is automatically saved on the server.
2. In addition, the segment is saved locally in the browser temporary cache. This acts as a backup if the internet connection is down.

XTM adds to the history each time the segment is saved. The information includes the date and time of the change along with its author. To view the segment history, place the mouse cursor in the selected segment and then select History in the docked panel.



Version history window in docked panel – active segment

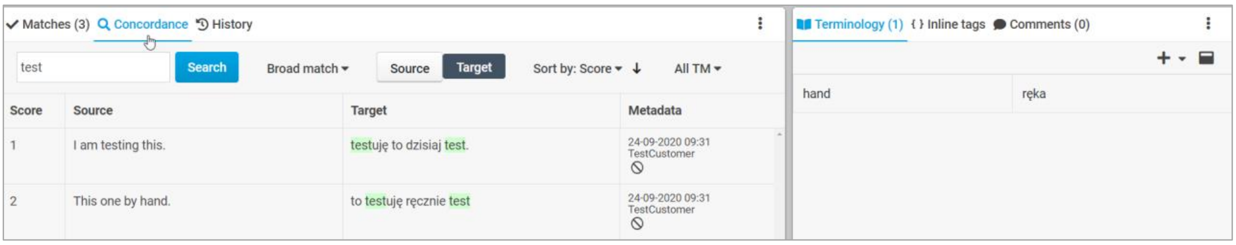
From this window you can view any previous version of the current segment and restore it by clicking the circular arrow.



Restoring segments from history

Concordance

Concordance is opened in the panel docked. The panel displays the latest source and target language phrases in the translation memory along with the modification date and customer name. Hover over the Metadata column to view additional information for the segment. The downward arrow button in the Metadata column provides options to sort by: score, customer, date created, date modified, file name, segment ID or tags. When these are used, the results are first sorted by the selected criterion and secondly by the score.



Concordance in the docked panel

You can use the Concordance option from the docked panel or from the context menu. In the docked panel, type the word into the search box and click Search to obtain concordance results.

There are three search options available from the docked panel:

- **Broad match** find segments with any of the words in the search phrase and other words or characters
- **Phrase match** find segments with all the words in the search phrase, but in any order
- **Exact match** find segments only with the words in the search phrase in the correct order

In this way, you can choose to see results that are exactly the same as the concordance search phrase, results that include all of the words from the search phrase, or results that can include any of the words being looked for.

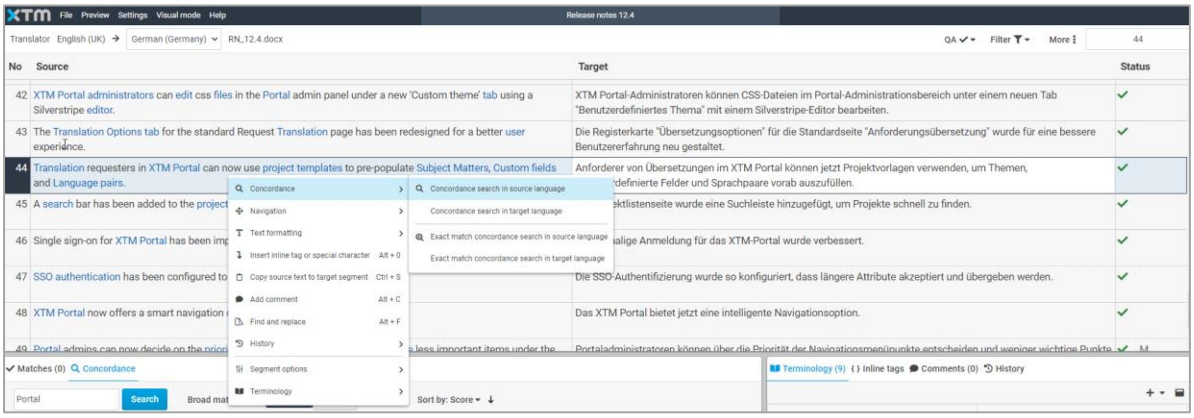
From the context menu:

1) Highlight a word in the target segment.
2) Right-click it to open the Concordance menu.
3) Choose Concordance search in the target language.
4) Go to the docked panel to see the Concordance search results.

Concordance searching can be performed either in the source or target text.

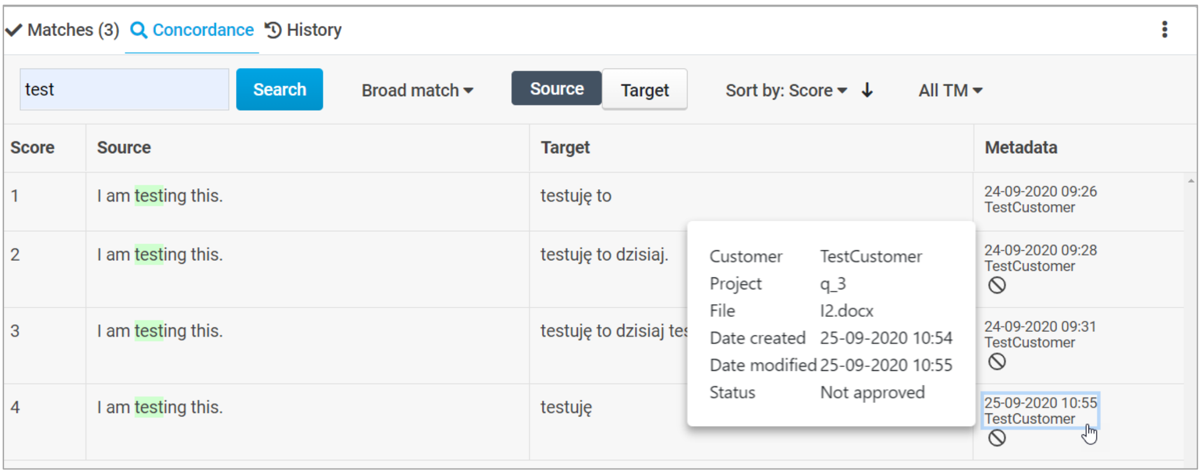
There are two options available in the Concordance context menu:

- Default – results are based on the linguistic stem of the chosen word and will match other forms of the word. This allows translators to check how the word was previously translated. The various segments are shown in order of relevance.
- Exact match – to find segments only with the words in the search phrase in the correct order.



Concordance search from the context menu

You can choose to search source and target language words or phrases either in the whole set of Translation Memory databases connected to the project or just in the approved Translation Memory. The Not approved status is displayed as an icon. If you are not sure what status of the TM search result is, left select the Metadata column to open a popup with additional details about the segment.



Result of Concordance search in All TM

Results of Concordance search in Approved TM

Comments

In XTM, you can add comments on a segment level. You may view all the comments, or they can be filtered to show only comments created automatically by the corrector and manually entered comments.

Adding comments

Comments can be added to an active segment directly from the segment or from the docked panel.

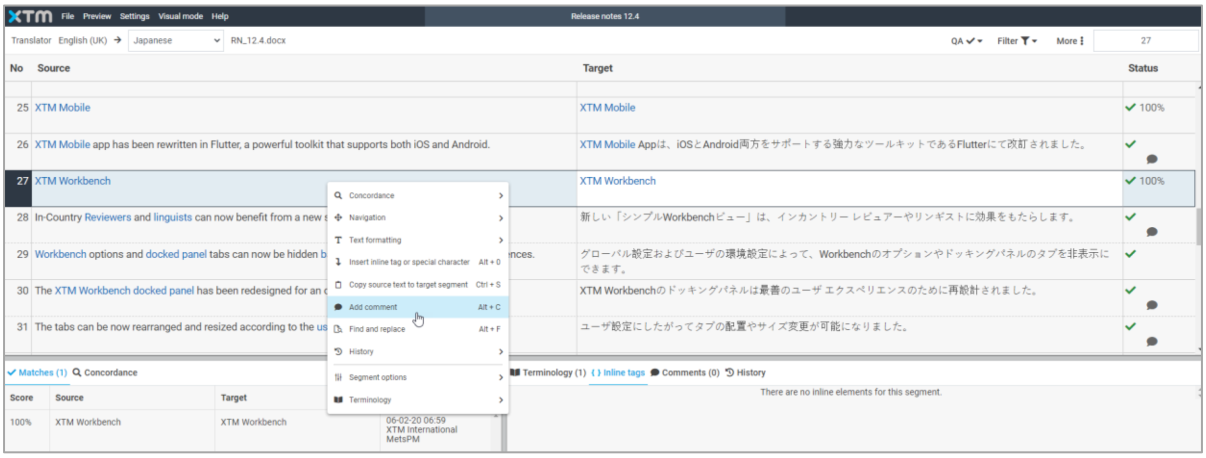
To add a comment from the docked panel:

1) Click the callout icon under the Comments tab to open the Add comment dialogue window.
2) Type in your comment.
3) Select Add to save it. The comment is saved with the name of the person adding the comment and a date time stamp.

Comments in the docked panel

To add a comment from the context menu:

1) Right-click the segment you want to add a comment to.
2) Go to Add comment to open the Add comment dialogue window.
3) Type in your comment.
4) Select Add to save it. The comment is saved with the name of the person adding the comment and a date time stamp.



Adding comments from the context menu

Once a comment is present in a segment, the callout icon appears in the status column, while all the comments are displayed in the docked panel. To view the next segment with a comment, select on the next/previous comment callout icons with arrows.

Deleting or editing comments

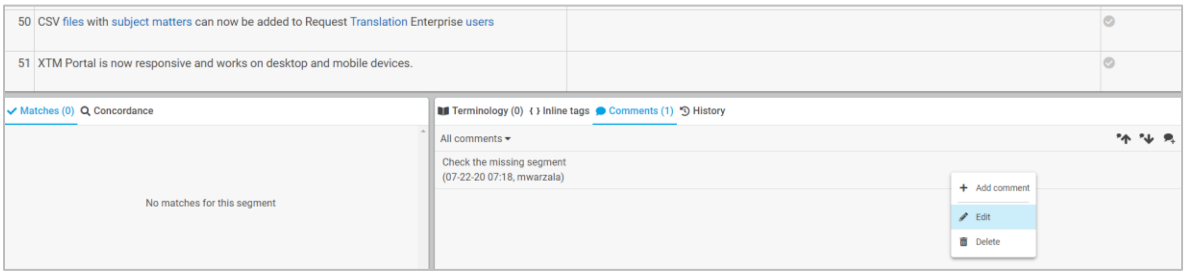
Comments can be deleted from the docked panel. Note that only the person who entered the comment can edit or delete it, and this can only be done when the workflow step is active.

To delete a comment:

1) Hover over or right-click the selected comment in the docked panel.
2) Select the bin icon. A message will appear asking you to confirm your choice.
3) Select OK to confirm it.

To edit a comment:

1) Hover over the selected comment in the docked panel.
2) Click the pencil icon. A dialogue window will pop up.
3) Make the necessary changes to the comment.
4) Select Save.



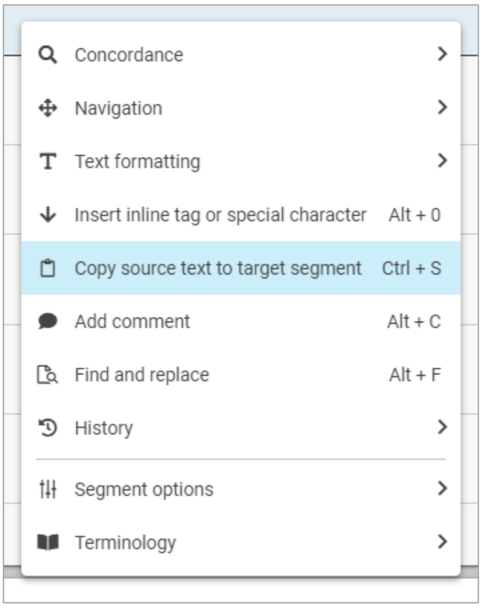
Comments in the docked panel - edit/delete icons

Context menu for text – other features

The context menu is available from two levels:

- Upon right-clicking a segment, and
- From the navigation panel, under the More menu.

When you right-click the source or target text, a context menu appears offering you the following functionalities: Concordance, Navigation, Text formatting, Insert inline tag or special character, Copy source to target segment, Add comment, Find and replace, History, Repeated segments, Segment options, and Terminology.



Context menu for text

Concordance

See description here.

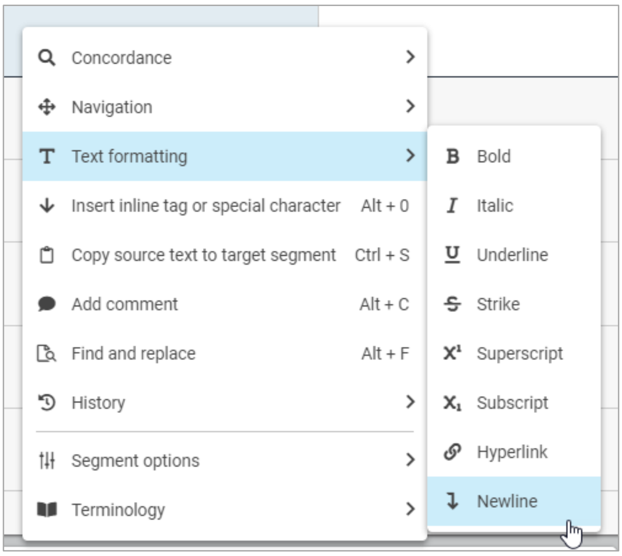
Navigation: navigating between segments

Navigation provides quick access to features related to movement between segments and actions performed on specific segments. All options are available from this context menu and as a keyboard shortcut.

Text formatting in XTM Workbench

This item is available in the context menu only when the text formatting feature is enabled for the project. The text formatting feature is available in the XTM Workbench only for projects created after the text formatting option has been enabled and for file formats specified either in the XTM configuration or under a specific customer setting (see: Configuration > Settings > Translation> Workflow and access).

It is important to remember that when text formatting is enabled for a project it is not possible to generate any files or packages for offline translation, such as XLIFF files, the Excel Editor spreadsheet, or the TIPP package. To enable the generation and import of XLIFF files for projects with text formatting, please contact XTM Support at support@xtm.cloud.

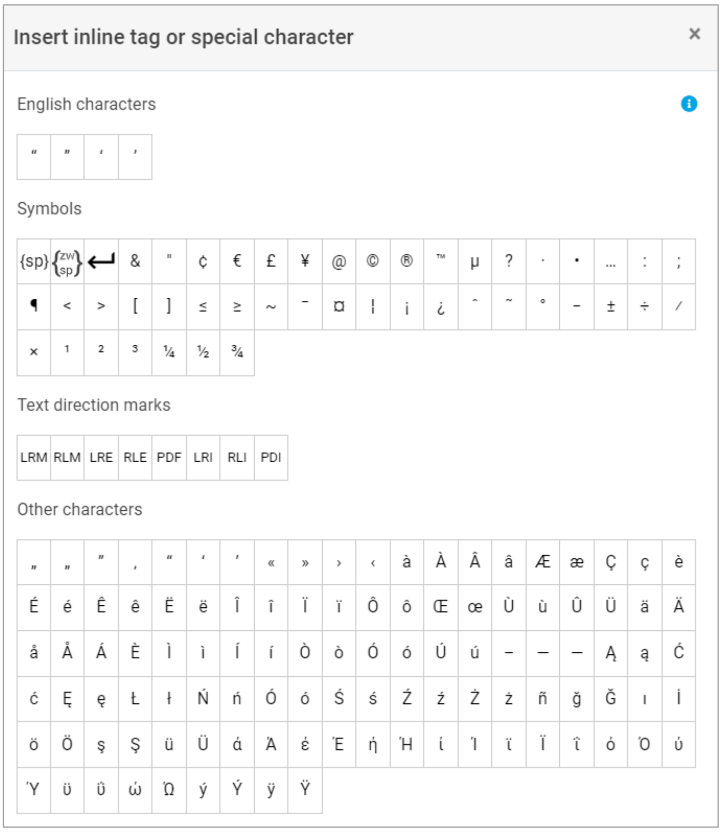


Text formatting menu

Note: To apply any formatting, first a text should be selected in the target segment. When a text is selected in a target segment, it should be wrapped with two inline tags (except the "New line" one), otherwise a single inline tag is inserted in the cursor position. All text formatting inline tags should be validated – a closing tag is always required; additionally, in the case of the URL inline tags, the specified URLs in an opening and closing inline tags should be saved, otherwise a validation error occurs).

Insert inline tag or special character

Whenever there are inline tags missing in the target segment, you can add them from the context menu. The list of missing inline tags is available in a pop-up. Learn more about inserting inline tags and special characters here.



Available inline tags or special characters

Add comment

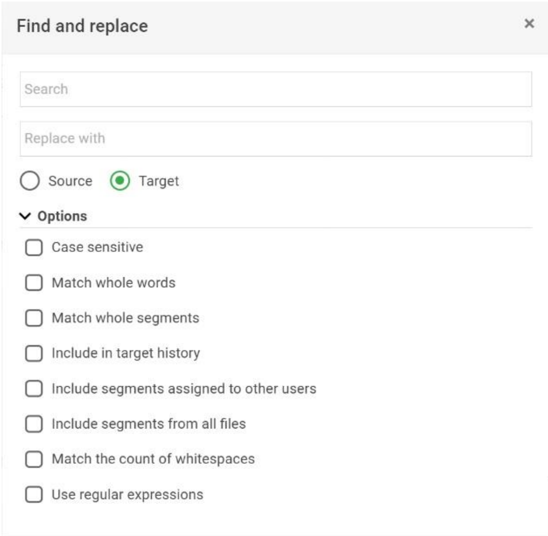
See description: here.

Copy source text to target segment

This option allows you to insert content of the source segment into corresponding target segment.

Find and replace

The Find and replace window shown below can be opened by selecting it from the context menu or using the keyboard shortcut – the default value is Ctrl+F.



The Find & replace window

You can search for the word in either the source or target text. However, you can only find the word in the source text, but not replace it. In this case, the replace buttons are greyed out.
There are several search options to find segments where:

- The text is the same case
- The whole word is matched and not part of it
- The whole segment is the same
- The segment history is included in the search
- Segments assigned to other users are included
- All files in the project are included in the search
- Take into consideration the count of whitespaces
- You can use regular expressions

The search mechanism will have the following options:

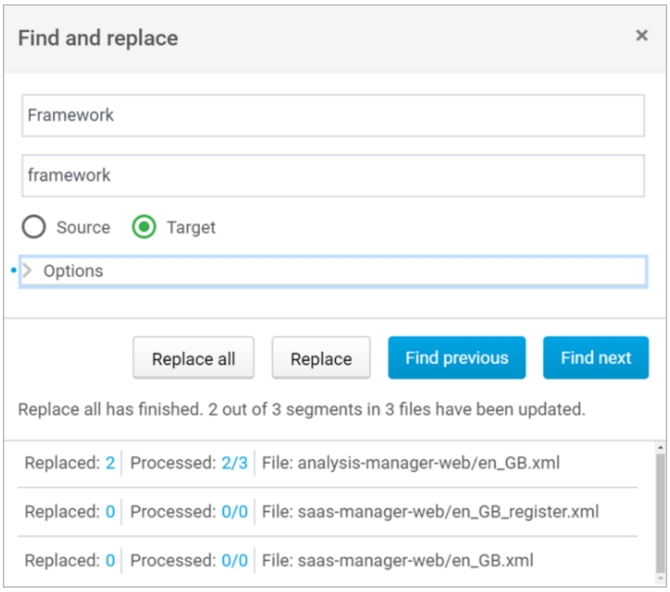
1) Go to the first result found in the document (message: “You’ve reached the last result. Select ‘Find next’ to search from the beginning.”)
2) Go to the last result found in the document (message: “You’ve reached the first result. Select ‘Find previous’ to search from the end.”)

If you did not highlight the search word in XTM Workbench, type it in the search box. Then type the replacement word. Select the Find previous or Find next button, depending in which direction you want to start the search. When the word is found, the Replace and Replace all buttons become active.

Next, either select the Replace button to just replace this word, or “Replace all” to replace all the words in the document or project.

Note: While the Replace all action is taking place, all the segments in the document will be locked and greyed-out. Depending on the size of the documents, Replace all can take several minutes. Once the replacement of all words in the project or document has finished, you will receive information about how many occurrences of the given word have been replaced and in which files.

When it is impossible to perform Replace all, e.g. because segments are locked or due to existing ICE matches, the Replace all button will change into Skip.



Details about updating files with replaced words

History

Under the History tab you can find all previous versions of the segment whether or not they were saved to the server. You can use this option to restore a previous version of translation to the segment.

Segment options

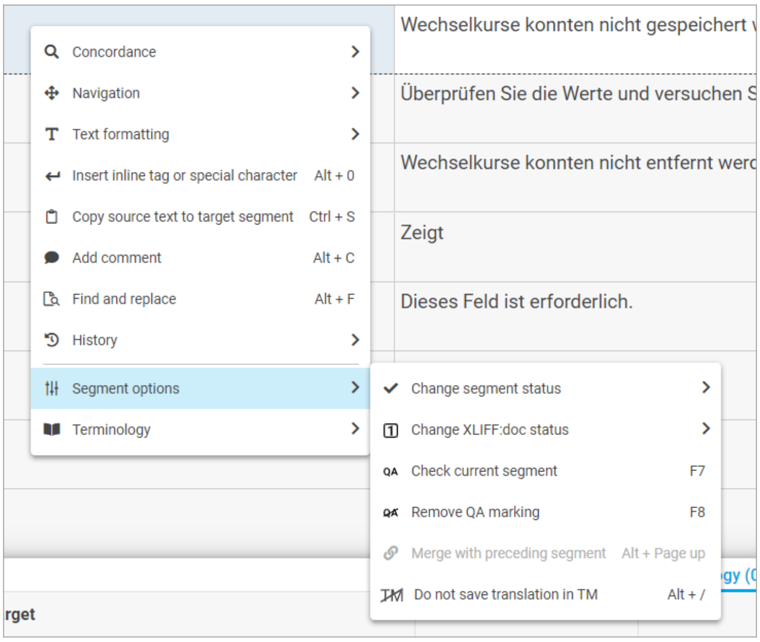
Change segment status: You may change the segment status by opening the context menu and choosing one of the available statuses.

Change XLIFF:doc status: If you have TIPP switched on in Configuration> Settings, then the XLIFF:doc segment status will be displayed in the Workbench to the left of the standard XTM status. You may change the status of a segment by selecting the desired status from the drop-down menu.

Check current segment and **Remove QA marking** options allow you to run QA on the active segment and remove QA markings in the active segment.

Merge with the preceding segment: In order to merge the current segment with the one above, right-select the segment you want to merge or use a shortcut. Note that this is only possible if the two segments are in the same paragraph in the source document.

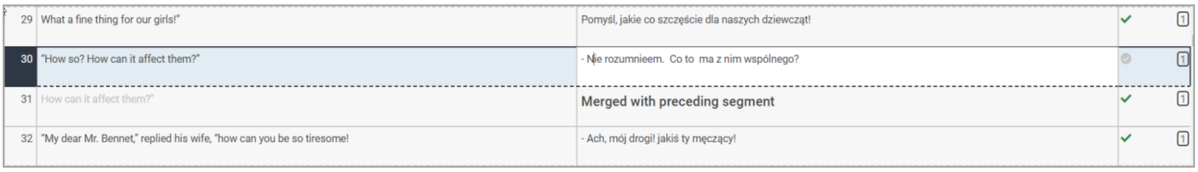
Do not save translation in TM: Use this option not to save a translation of the segment in a translation memory.



Contents of the Segment options tab

Merging and unmerging segments

Once the segment has been merged, a piece of information appears in the target segment "Merged with preceding segment", while the merged source segment is greyed-out.

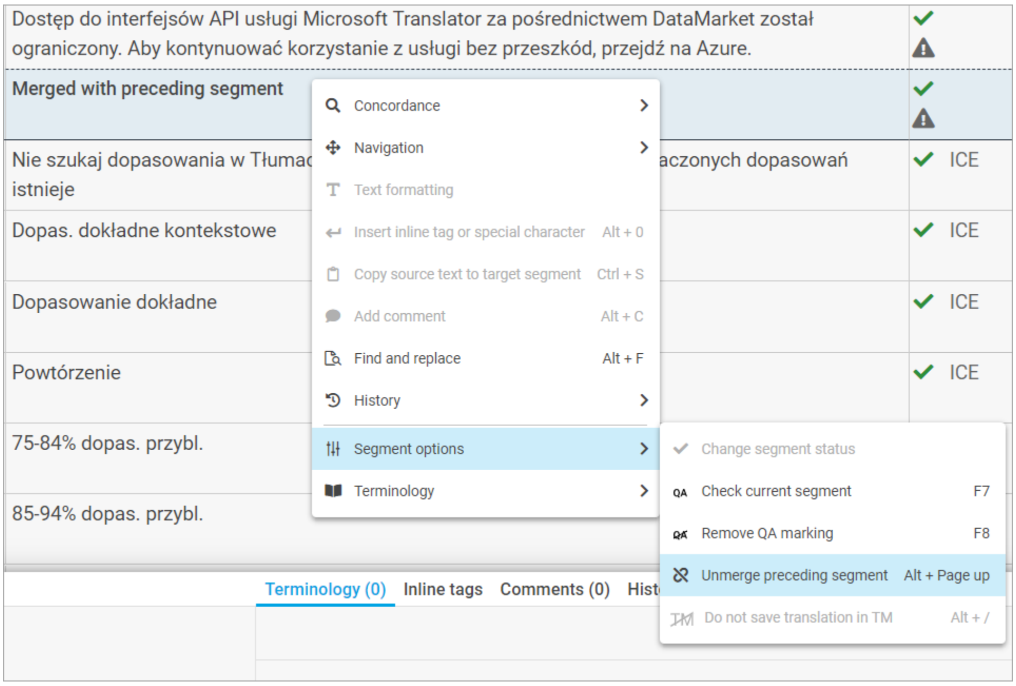


"Merged with the preceding segment" information

There are some rules governing the merging and unmerging of segments:

- You can only merge segments that originated from the same paragraph in the source document. In XTM Workbench these segments are separated by a dotted line. You cannot merge segments from different paragraphs. These segments are separated by a solid line.
- When you need to merge more than two segments, always start merging from the last segment. For example, if you wish to merge segments 1, 2, 3, first merge segment 3 with 2 and then 2 with 1.
- The opposite applies when unmerging segments – start unmerging from the first segment.
- You cannot merge a segment with another segment that is in the read-only mode.

To unmerge two merged segments, right-click the segment that says "Merged with the preceding segment" to bring up the context menu. From the context menu choose Segment options and then Unmerge the preceding segment.



Unmerging segments - context menu

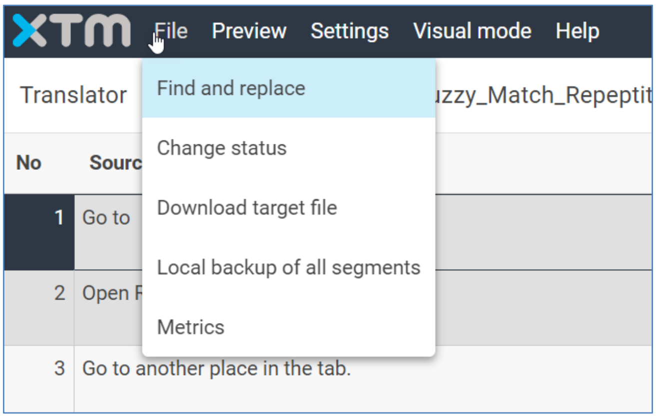
Terminology

See description here.

File menu options

The file menu allows you to use:

- Find and replace feature
- Change segment status
- Download target files
- create local backup of translated segments
- view or download project metrics



Contents of the File tab

File > Find and replace

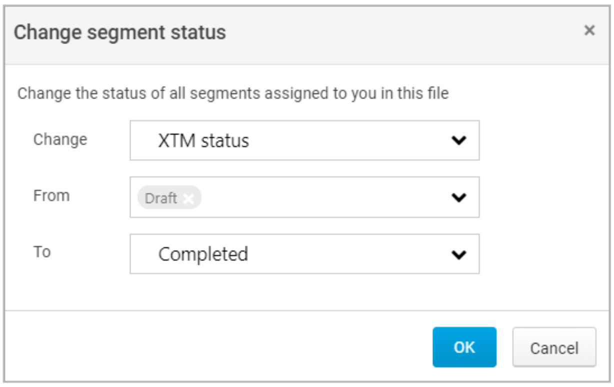
See description here.

File > Change status

This option allows you to change the **status of segments in** one batch.

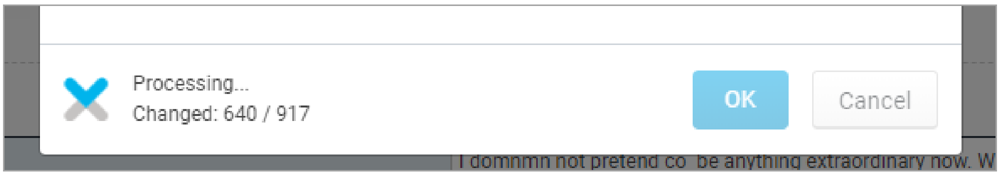
Changing the statuses of all segments:

1. Go to File > Change status to open a popup window.
2. Choose the segments where you wish to change the status: XTM status or XLIFF:doc status.
3. Next, choose the status to change (From). More than one status can be selected.
4. Choose the status it should be changed to (To).
5. Select OK to confirm.



Changing the status of all segments

You can follow the progress of changes and how many statuses (statuses per segment) are already updated.



Process of status changes – notification

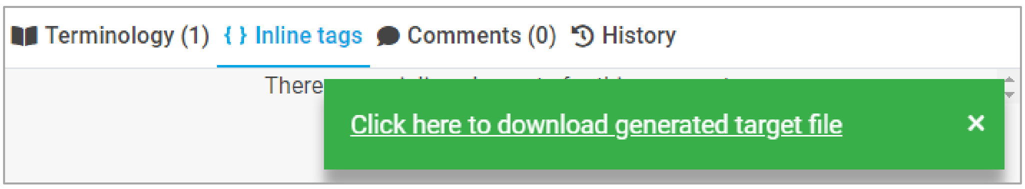
When the action is finished, a message appears informing you how many segments were processed by the system although it may not be the same as the number of segment statuses changed.

If any segment filters are applied in your document, only the filtered segments will be processed

File > Download target file

Note: This option is unavailable for linguists unless authorization has been granted in Settings.

Once you decide to download a file, a message appears in the bottom section of the screen prompting you to download the generated file.



Message prompting the user to download the target file

File > Local backup of all segments

You can restore a local backup of all segments in the entire document. You can access the local backup of all segments from:

- History tab
- File tab in the top bar
- the context menu in the segment

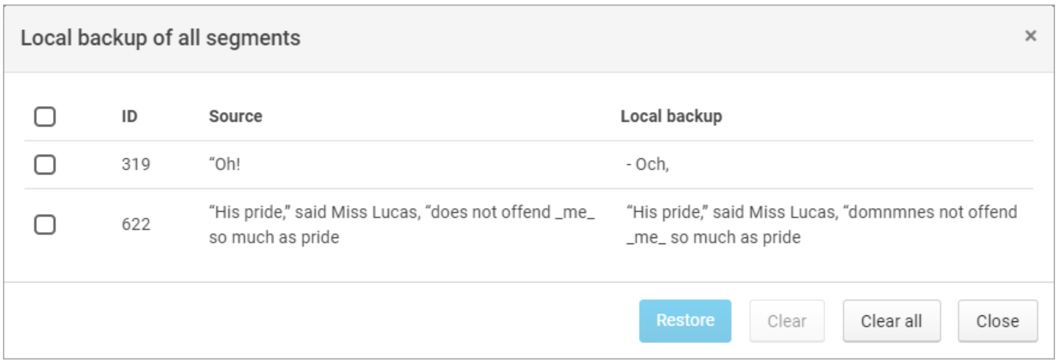
Restoring segments from the local backup:

1) Open the File > Local backup of all segments.
2) A pop-up window appears with options of which segment you want to restore.
3) Choose any or all the segments in the document by ticking the box and select Restore.

Note: The option of restoring segments will automatically remove the segments from the local backup.

Clearing selected segments from the local backup:

1) Open the File > Local backup of all segments.
2) A popup windows appears with options to choose which segments you want to clear.
3) Select Clear all.
4) A confirmation popup appears prompting you to confirm the action.
5) Select OK, to confirm.



Local backup of all segments in the document

Clearing all segments from the local backup:

1) Open the File > Local backup of all segments.
2) A pop-up window appears with options to choose which segments you want to clear.
3) Choose any of the segments from the document by ticking the box and select Clear.
4) A confirmation pop-up appears prompting you to confirm the action.
5) Select OK, to confirm.

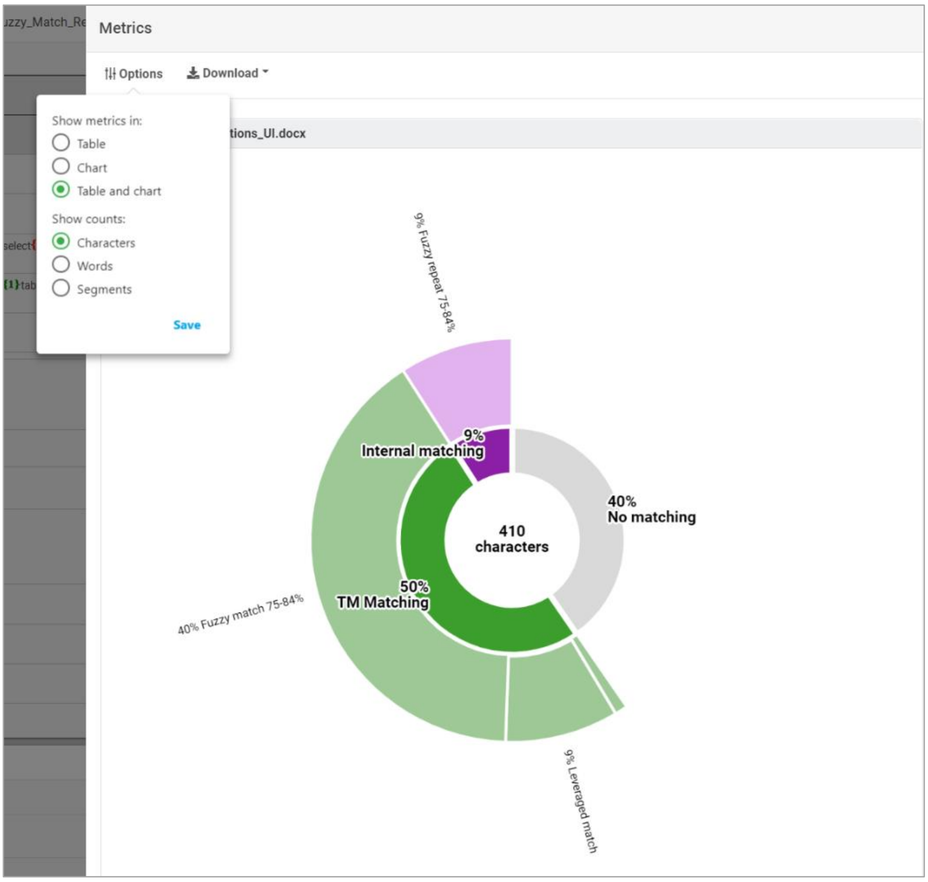
Note: The Local backup of all segments pop-up window does not close immediately upon choosing one of the options available. You can choose to restore selected segments, confirm the action and continue performing other actions without leaving the pop-up window.

File > Metrics

Linguists and Project Managers can access Metrics directly from XTM Workbench.

1. Go to File > Metrics to open a popup with project or task metrics.
2. In the popup, under Options, you can choose the way the Metrics data is shown in XTM Workbench: as a table, on a chart, or both.
3. In the same popup, decide which Metrics you wish to view: character
    a. word count
    b. segments

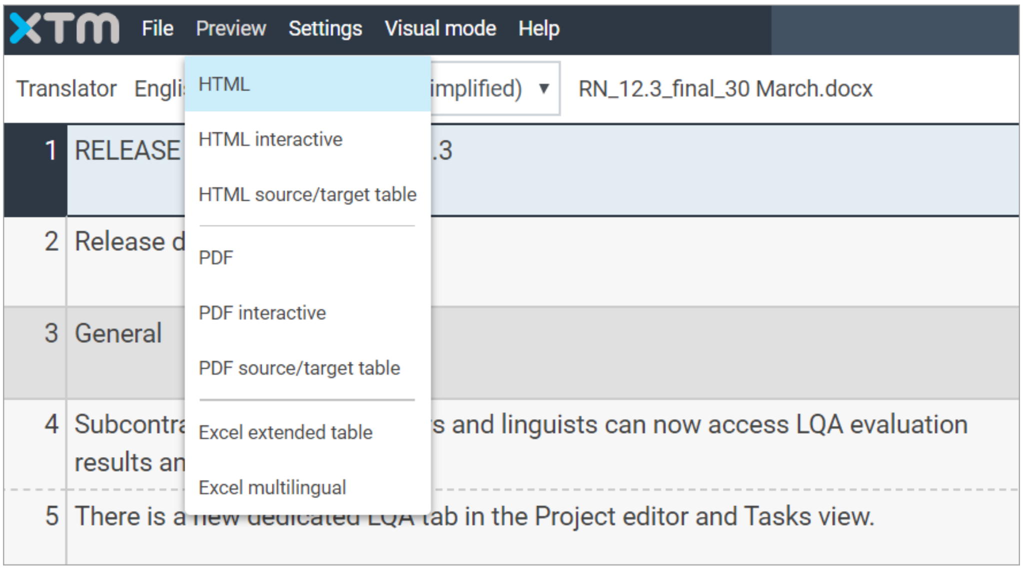
Under Download, you can choose in which format metrics can be exported: as a CSV, flat XLSX, or. XLSX file.



Metrics – options menu

Preview

This menu provides quick access to generating previews of the target file.



Contents of the Preview tab

HTML – available for MS Word files

HTML interactive – available for XML files such as SimView, Rigi, Xbench as well as MS Word files; clicking a sentence in the preview activates this segment in XTM Workbench;

HTML source/target table – previews the source and target translation side by side along with segment numbers, and statuses

PDF source/target table – previews the source and target translation side by side along with segment numbers and QA warnings

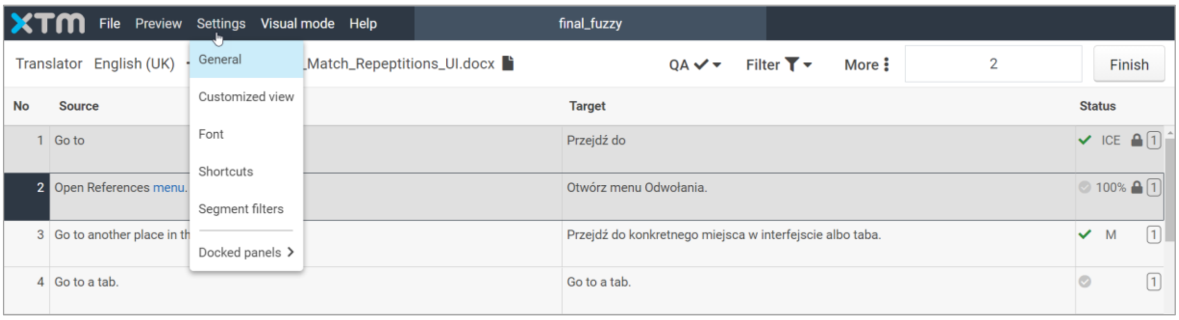
PDF – previews target file in the PDF format

PDF interactive – allows user to download the target file and preview it. Clicking a sentence in the PDF preview will highlight the corresponding segment in XTM Workbench. For the feature to work properly Adobe Reader is required. In the case of InDesign files, only if an InDesign server is enabled.

Excel extended table – previews the source and target translation in an off-line mode, along with segment IDs, XTM status, Comments, Date created, Date modified and person who last modified the entries

Excel multilingual – previews the source and target translation in many languages for each string along with segment numbers

Settings

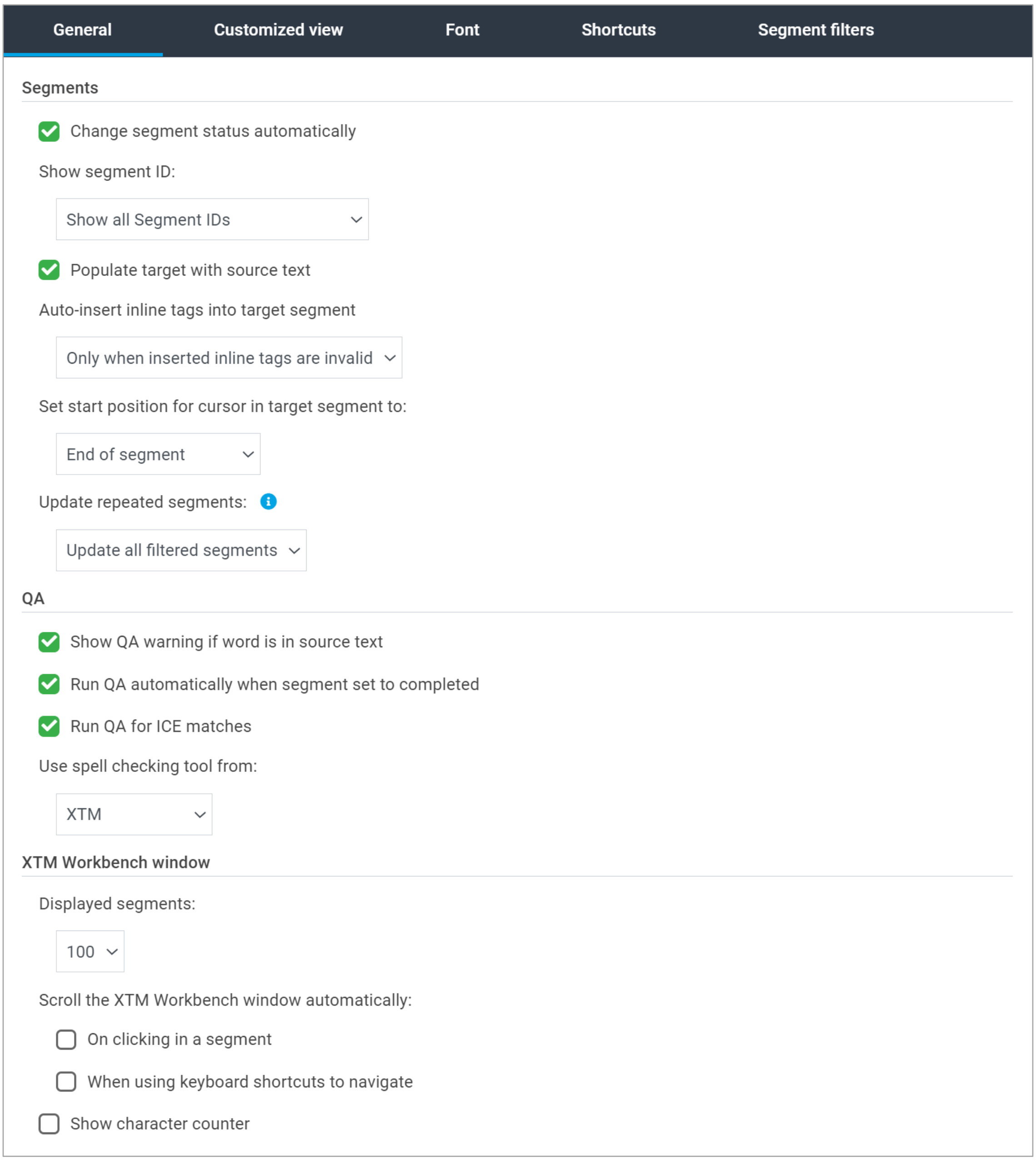


Contents of the Settings tab

Settings > General

The functionalities that can be adjusted under General settings include:

- Change segment status automatically
- Show segment ID
- Populate target with source text
- Auto-insert inline tags into target segment
- Set start position for cursor in target segment (at the beginning or at the end)
- Update repeated segments
- Show QA warning if word is in source text
- Run QA automatically when segment set to completed
- Run QA for ICE matches
- Spell checking tool to use (XTM or Microsoft Word)
- Number of displayed segments
- Scroll the XTM Workbench window automatically
- Show character counter



General options under the Settings tab

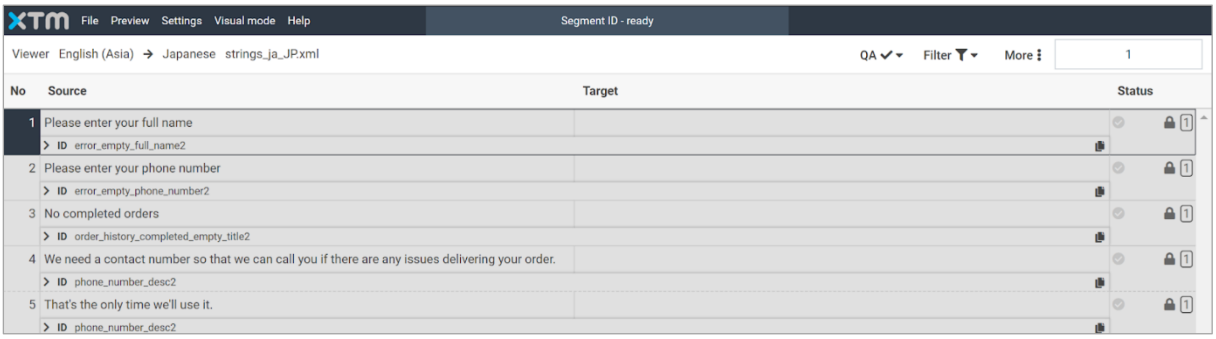
Settings > General > Show segment IDs

It is possible to add a unique tag for each segment. If configured properly, IDs will appear in a box under segment content. This feature can be used for the process of ID segment matching. It can also help the translator identify the segment location in the project Currently, XTM supports ID generation mechanism for xml, json, xlsx, yml, yaml, xls, strings, properties. To enable the Segment ID feature on your account, contact XTM Support Team (support@xtm.cloud). More on ID-based matching see here.

In XTM Workbench, linguists can configure if and when they want to see the segment IDs by choosing one of the following options:

- Do not show Segment IDs
- Show all Segment IDs
- Show Segment ID of active segment

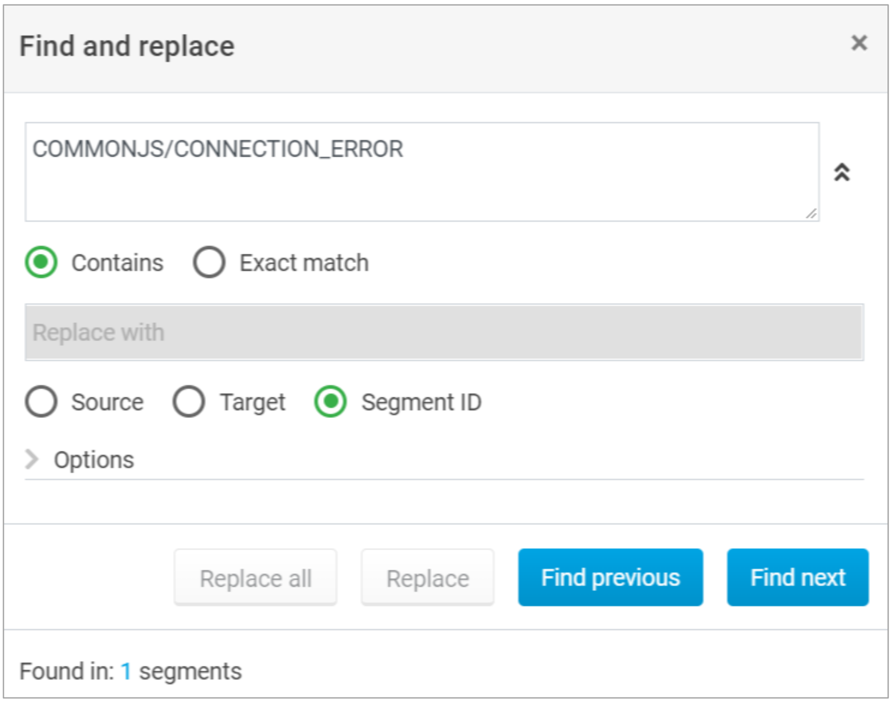
Note: Segment IDs hidden from view in XTM Workbench will still be searchable in the Find and replace option.



Segment IDs visible under each segment

Segment IDs can be copied and then pasted into the Find and replace search engine. The search engine allows you to look for exact or partial match of the ID.

Copy segment ID icon



Find and replace option for Segment IDs

Customized view

XTM Workbench options and docked panels can be hidden based on global settings and user preferences.

> *Before you start:* The Customized view tab appears on the XTM Workbench navigation bar when options:

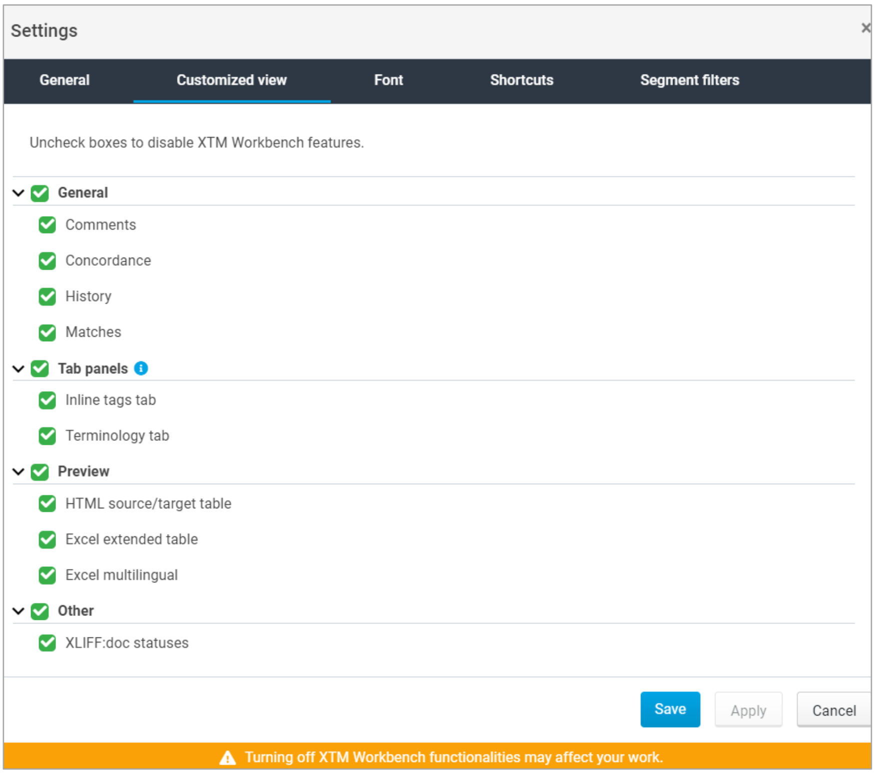
- Enable XTM Workbench customization
- Allow user to customize XTM Workbench

> are activated on the global level (Configuration > Settings > Translation > Workflow and access > XTM Workbench customization – see more on this here).
>
> The features available to users for customization depend on the settings configured by PMs or Admins on the global level in the Simplified Mode (Configuration > Settings > Translation > Workflow and access > XTM Workbench customization > Define Simplified Mode – see more on this here).

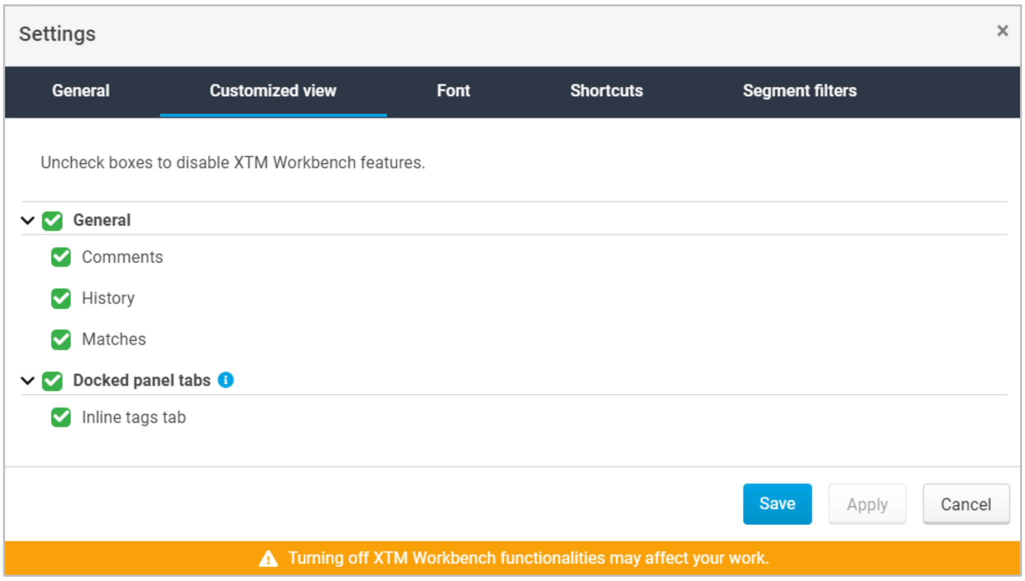
In the standard, non-simplified mode, all XTM Workbench features are visible, but the user may choose which of them are to be displayed in the course of their work. For example, the Matches panel can be turned off which means that all the options related to matches will be hidden from view, e.g. shortcuts, filters, icons, etc.

When you hide from view the Inline tags and Terminology panels, the panels will not be visible, but their functionalities will continue to work. This means that terms will be decorated, and inline tags will be displayed in segments.

Note: In the Simplified Mode, the LQA panel cannot be selected to be hidden from view at the system or user level.

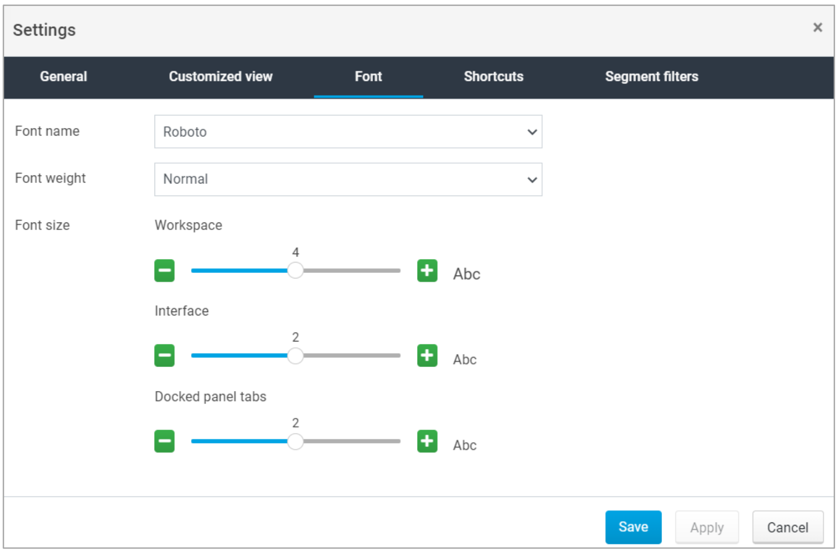


Customized view – access to all the features



Customized view – access to the visible features defined in Simplified Mode

General > Font



Font options under the Settings tab

The following fonts are available in XTM Workbench to choose from in the drop-down menu:

- Arial
- Courier
- DaunPenh
- Leelawadee
- MS Gothic
- MS Mincho
- Preeti
- Roboto

- SimSun
- Tahoma
- Times New Roman
- Verdana
- Vrinda

You can set different font settings for each level: for the workspace – 7 size levels are available, and for the interface and the docked panels – 3 size levels.

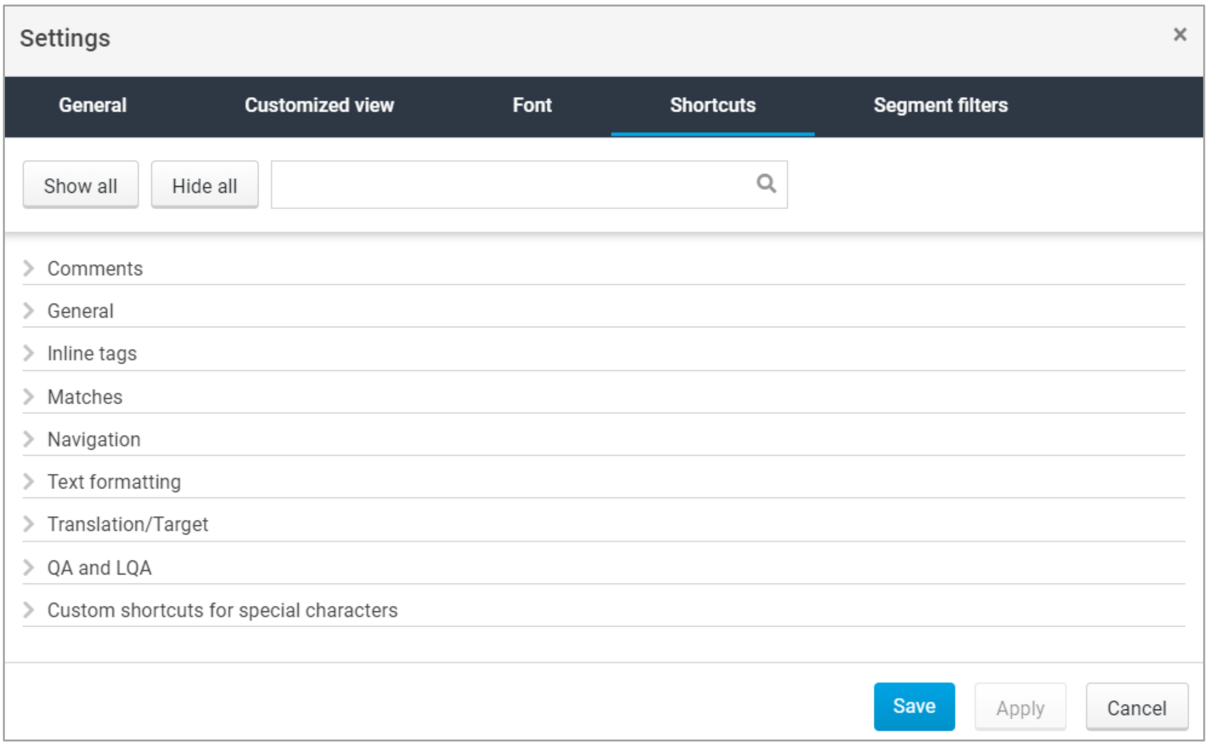
You can use the Font size slider or the +/- buttons to determine the right size.

Shortcuts in XTM Workbench

The shortcuts are browser-specific, so any changes to the shortcuts will only be available in the browser in which they were set. Other browsers will keep the previous shortcut.

Note: XTM Workbench does not support Internet Explorer.

The default Mac shortcuts only apply when XTM is viewed in Safari. There might be changes to the shortcuts if other supported browsers are used.



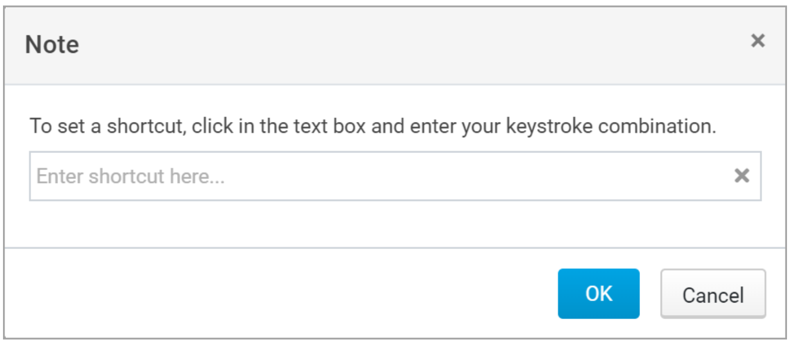
Shortcut options under the Settings tab

The window presented below allows you to view the current keyboard shortcuts and to customize them.

How to set a shortcut in XTM Workbench

1) Select Set shortcut.
2) In the Note popup type the keystroke combination for a new shortcut.
3) Select OK.

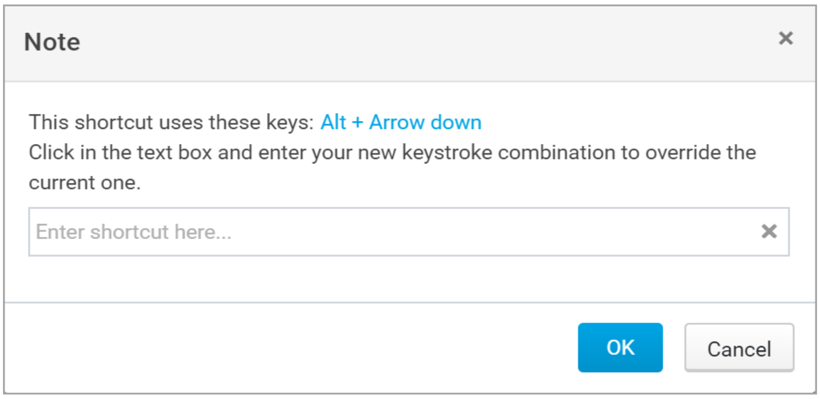
You cannot use the same combination for more than one command.



Setting shortcuts - pop-up window

How to change a shortcut in XTM Workbench

1) Select the keystroke combination you want to edit.
2) In the Note pop-up window type the keystroke combination for a new shortcut.
3) Select OK.



Setting shortcuts – overriding existing shortcut message

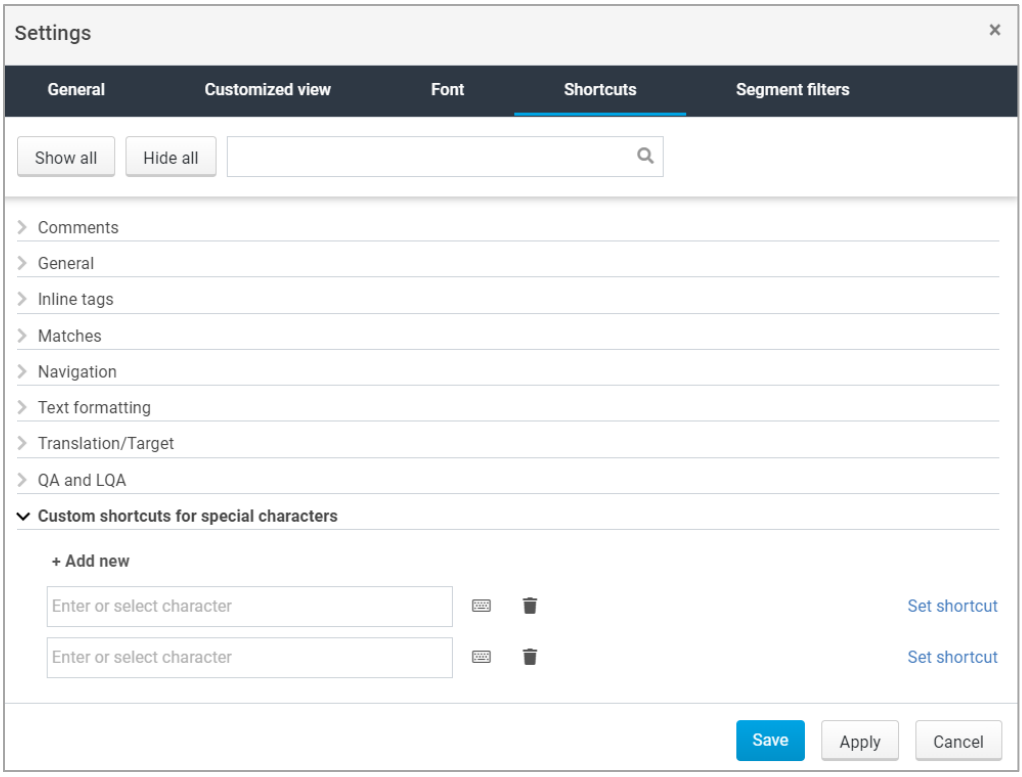
4) In the Settings menu:
   a) select Save to approve changes and close the Settings window
   b) select Apply to approve the Settings but keep the Settings window open.

Custom shortcuts

To enhance productivity and ease of use, XTM Workbench offers the possibility to create personalized shortcuts for special characters.

To set a custom shortcut for special characters:

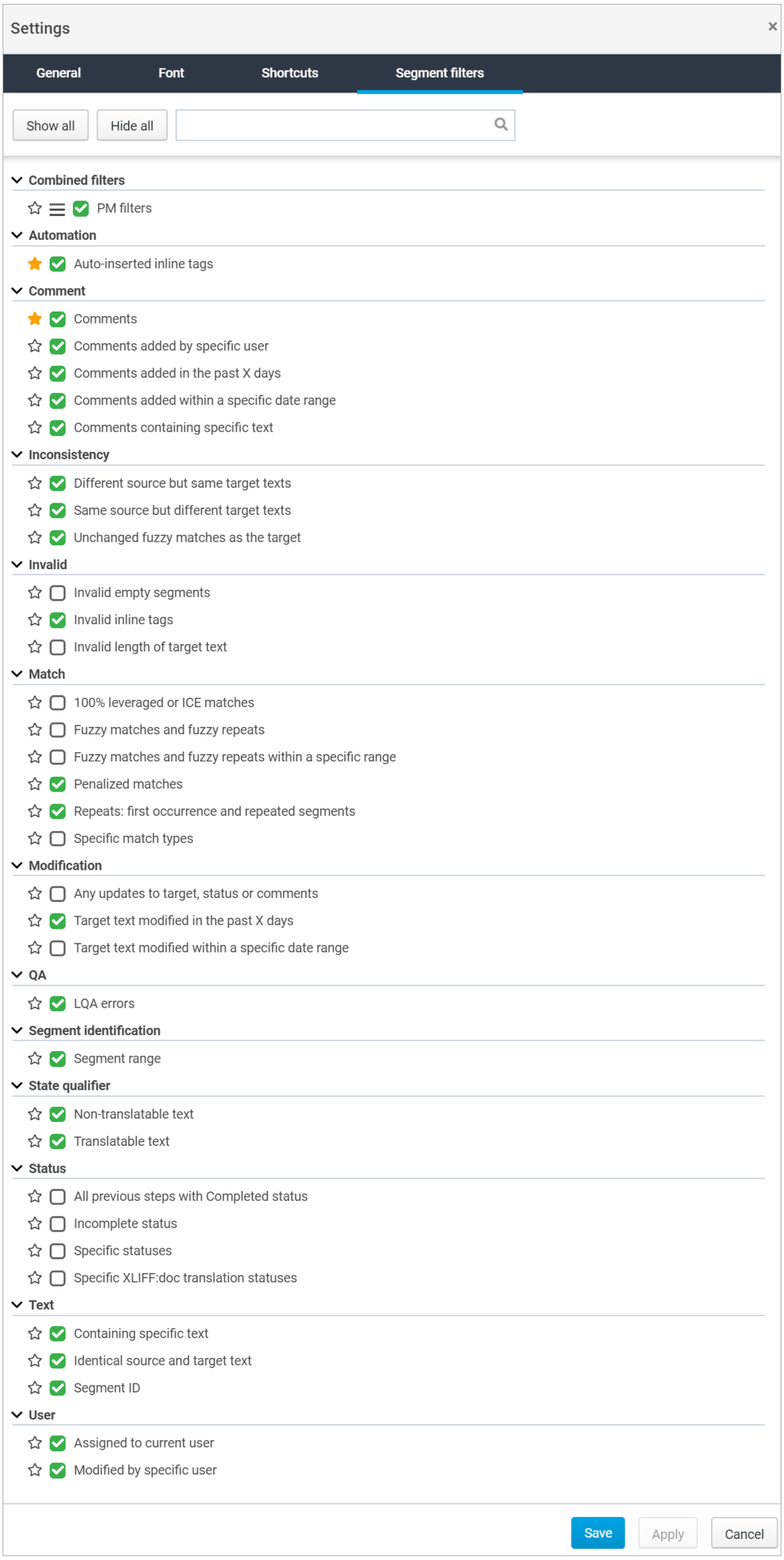
1) Go to Settings > Shortcuts and find the Custom shortcuts for special characters option.
2) Select Add new to gain access to a field where you will enter a special character of your choice. You can do this either by typing it manually or by choosing it from the list available under the keyboard icon.
3) Select Set shortcut and enter your keystroke combination.
4) Select OK.



Settings > Segment filters

The Segment filters tab allows you to customize the list of filters and filter profiles that you see by making them inactive and invisible in the list. Filter profiles created by an administrator are indicated by the exclamation icon. Profiles created by an administrator can be used in a standard way but cannot be edited.

Segment filters can additionally be marked as "Favorite" (clicking the star). By default, all the filters are active, and none are marked as favorite. Your system administrator can change these default settings.



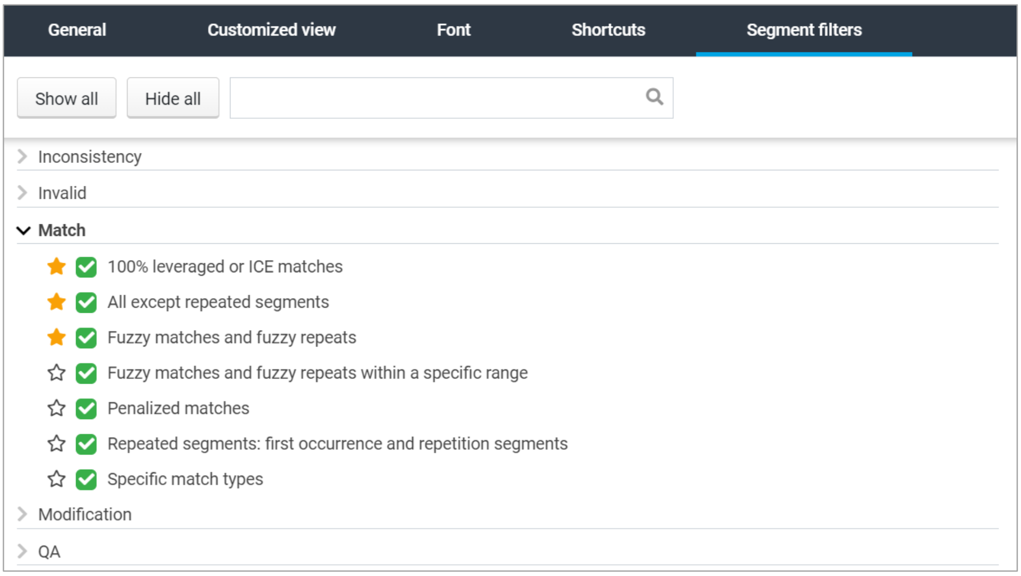
List of available segment filters

Creating a favorite filter

To create your favorite filter:

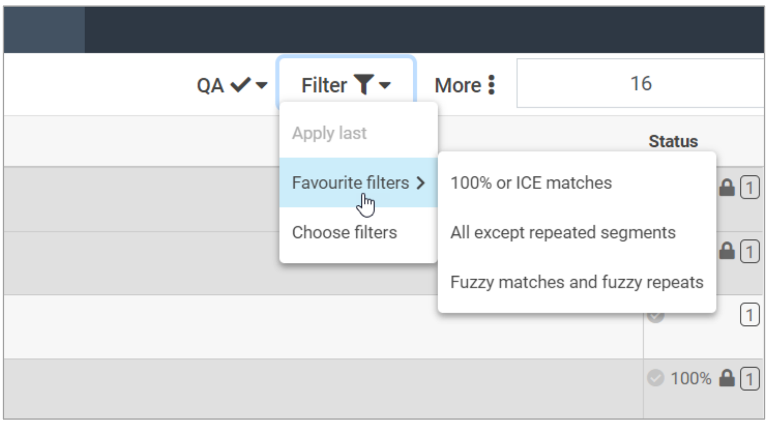
1) Go to Settings > Segment filters.
2) Select the filters by clicking the star icon to turn it orange.
3) Choose one of the following:
   a) select Save to approve changes and close the Settings window.

   b) select Apply to approve the Settings but keep the Settings window open.



Checking filters as favourite

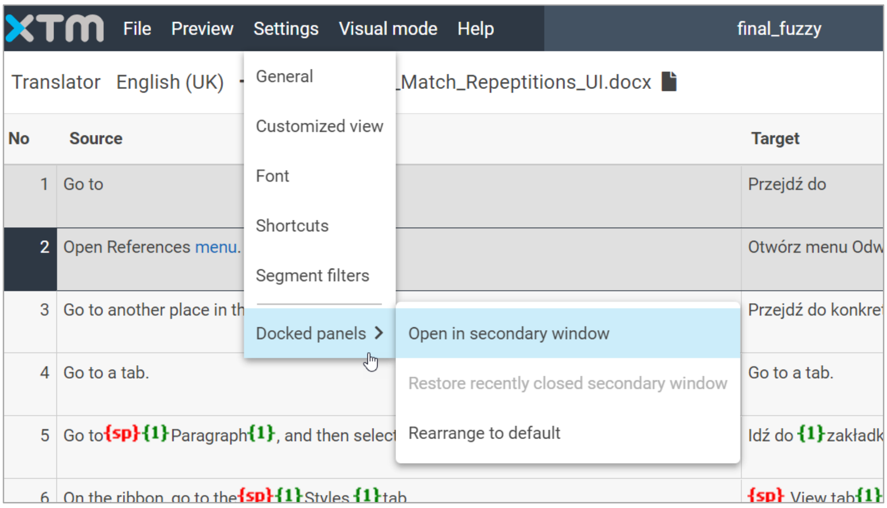
All the favorite filters are available at hand from the Filter icon.



Easy access to the list of favorite filters

Settings > Docked panels

See here

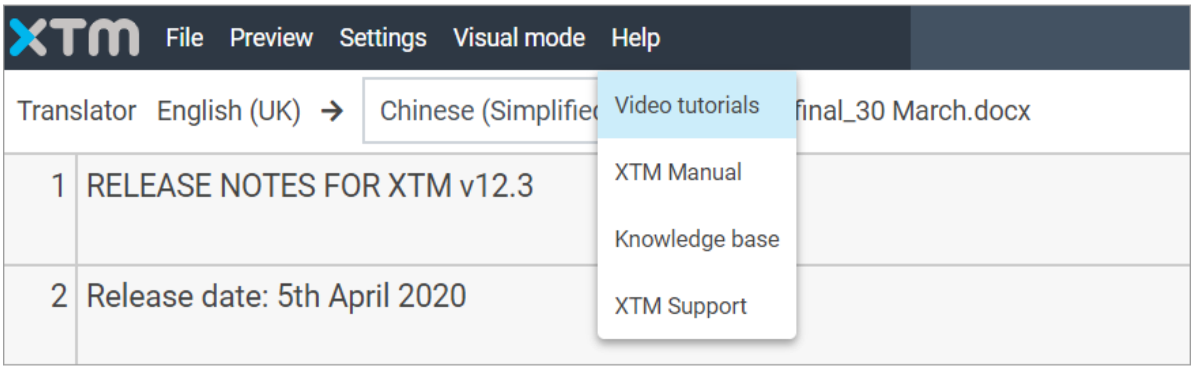


Visual mode

See here

Help

Under the Help tab, you have quick access to help resources, such as a link to XTM Manual, video tutorials, and knowledge base. Additionally, you contact our Support Team.

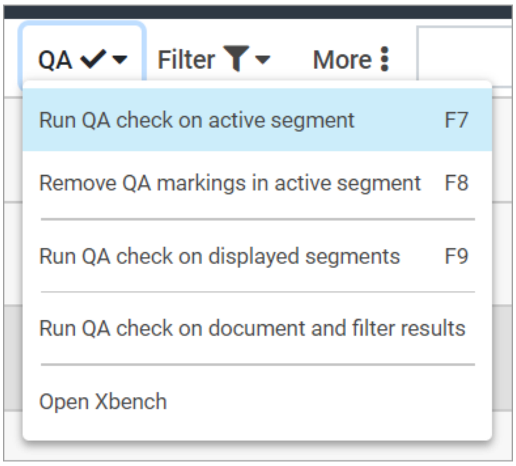


Components of the Help tab

Quality Assurance

To perform quality assurance checks:

- set a segment to translated: the QA checks occurs automatically
- go to the QA menu in the top right in Workbench, and select one of the options



Options for QA checks

Run QA check on active segment – checks translation quality within an active segment.

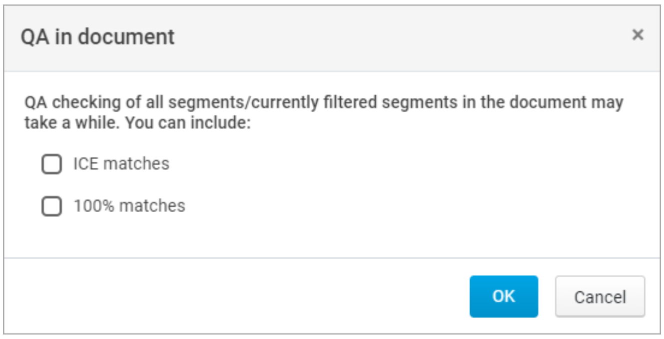
Remove QA markings in active segment – removes any markings of errors found in an active segment.

Run QA check on displayed segments – checks translation quality of the text currently displayed on the screen; the option restarts automatically when more segments are loaded.

Run QA check on document and filter results – runs global check on the document and filters segments with recognized errors. Upon selecting this option, a dialogue window appears where you can decide whether you wish to include ICE matches and 100% leverage matches in the check. If you do not tick either of the boxes, by default ICE matches and 100% leverage matches will not be checked.

Open Xbench check Xbench integration

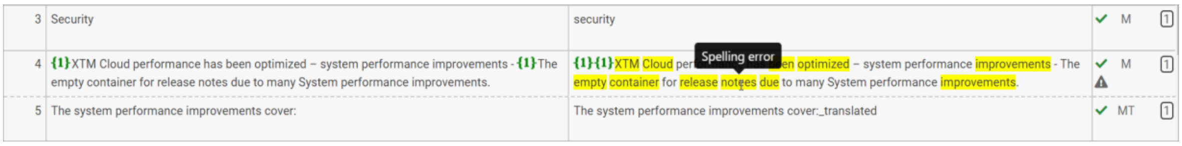
Activating QA puts on hold any action in the Workbench.



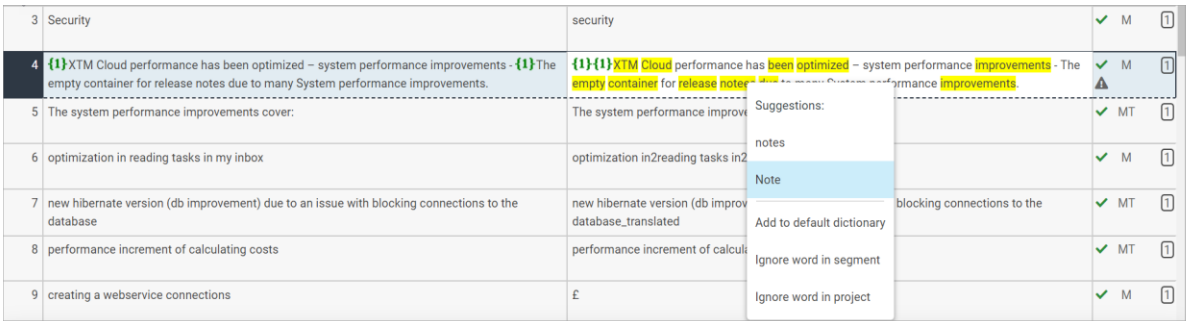
QA check message

Spell checking

Any spelling errors detected during the check are displayed by highlighting the word in yellow. If you select the misspelled word, XTM displays several suggested spellings for it. You then have the option to select one of the suggested words, add the suspect word to the custom default dictionary, and to ignore the word in this segment or in the whole project.



A spelling error warning

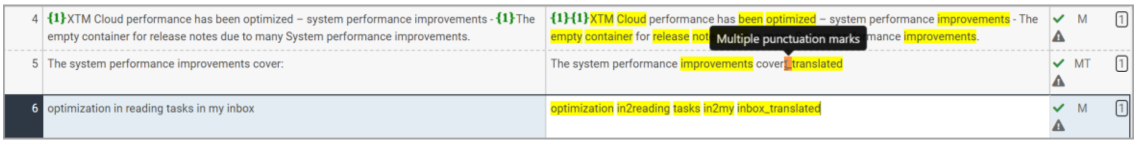


A list of suggested spellings for the word

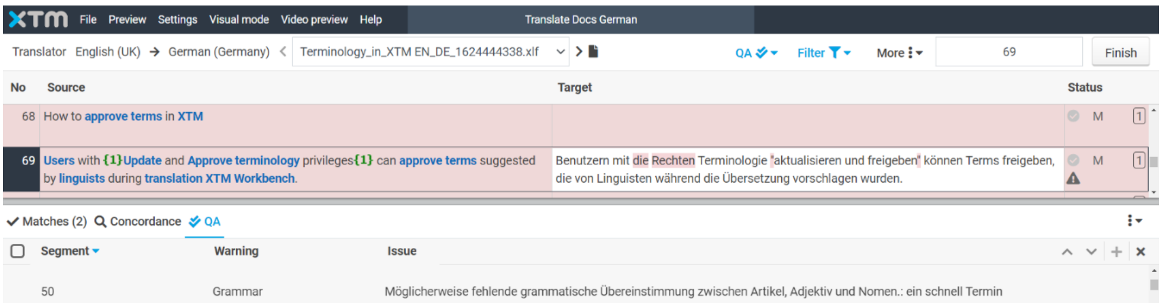
When a QA error is detected, it is highlighted. A description of the problem pops up when you place a cursor over the highlighted area.

What does a color highlight of a QA error mean?

- yellow: signifies a spelling issue
- orange: signifies any other QA issue based on the QA profile
- pink: **potential** grammar error

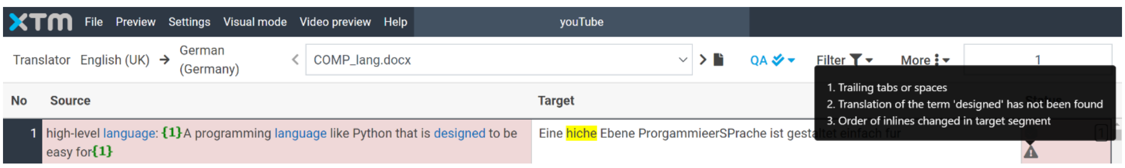


QA error example - multiple punctuation marks highlighted in orange



Checking grammar and style: potential grammar error marked pink. Details in the QA panel

Hover over the warning icon in the Status column for detailed information on the QA warning.



The QA warnings in the QA panel

The QA warnings are displayed in the QA panel, including:

- segment number
- warning category
- issue description

Processing QA warnings in the QA panel

- Click the warning to activate in Workbench the segment it relates to. A checkbox next to a warning indicates that an action is possible.
- Hover over the warning in the QA panel so that it is highlighted in blue.

Ignoring the warnings in the QA panel

You can ignore the warning by clicking the x at the end of the line.

Warnings without checkboxes indicate Quality issues where no action is possible.

Navigating warnings in the QA panel

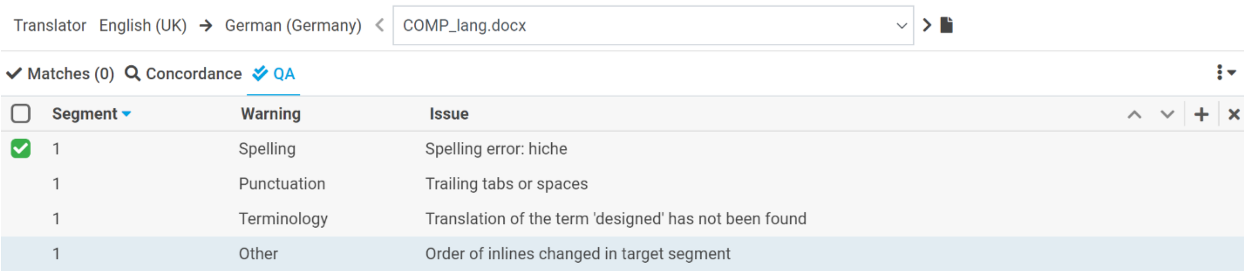
You can navigate the list using up and down arrows located in the top-right corner of the panel.

Processing multiple warnings in the QA panel

QA panel enables you to speed up the review process by processing multiple warnings in one go.

Example:
Removing multiple spelling warnings referring to the same spelling error.

1. Select multiple checkboxes.
2. Click the + sign in the top right corner of the QA panel.
3. Select the Add selected spelling errors to dictionary to add a new dictionary entry.

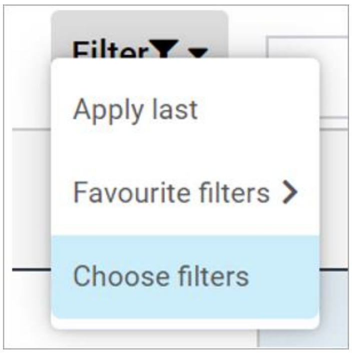


Note: For MS Word spell checking application – see here.

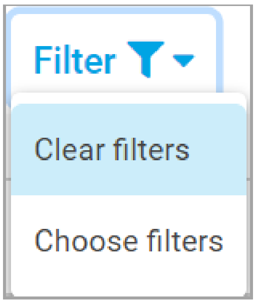
Segment filtering

Apply last: Applies the last filter used in this function
Favourite filters: Your favourite filters selected from the context menu.
Clear filters: The option becomes visible when any filter is activated. When the filter is deactivated, the option that allows you to "Apply last" filter appears.
Choose filters: The option opens a pop-up allowing for filter application.

When one or more filters have been applied, the Segment filtering icon turns blue. To switch off the filtering option and show all segments, select Filter > Clear filters.



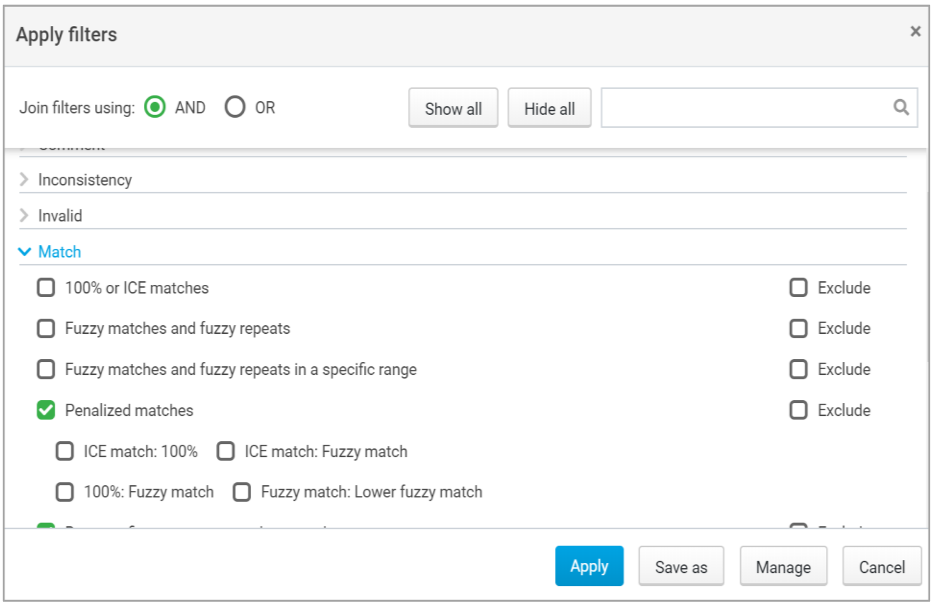
Filter menu



Filtering option turned on

Creating combined filters

You can create advanced, customized filters by joining two or more segment filters together with the use of Boolean AND/OR operators and by saving the combination as a Combined filter. You can also save frequently used configurations of a single filter for convenient reuse.

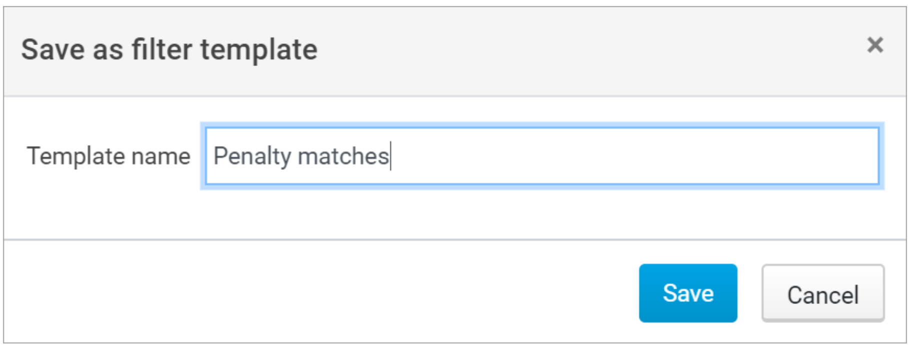


Configuration of combined filters

To create a combined filter:

1) Go to Segment filtering icon > Choose filters to open the Apply filters window.
2) Check the box next to one or more filters on the list and configure the filter parameters.
3) Check the Exclude box to exclude segments meeting that condition from the display.
4) If more than one filter is selected, choose whether to join the filters using the AND or operators by using the radio buttons at the top of the window.
    a. The AND operator means all of the conditions must be met for a segment to be displayed.
    b. The OR operator means that only one of the selected conditions must match segments to be displayed.
5) Type a template name and then select Save to save the selection in the form of a template.
6) Your new combined filter will be visible under the Combined filters tab.

Note: Filters in the form of already existing templates can't be included in the new combined filter.

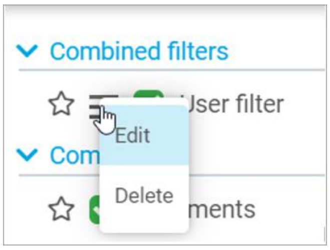


Setting a template name for combined filters - popup window

Modifying filters

To modify filters:

1) Select the Segment filtering icon.
2) Select the filter you wish to modify to open the Apply filters window.
3) Select the Manage button to go to Segment filters pop-up window under the Settings tab.
4) Make the necessary changes. Here, you can deactivate favourite filters or edit, or delete filters.
5) Select Save to save the changes or Apply to make use of them straight away.



Edit/delete filter menu

Segment status in XTM Workbench

	Incomplete
	Draft: This status allows you to enter a translation in a segment and move on to the next one, without validating it. Segments with this status are saved in Translation Memory as “Not approved”.
	Completed
	Non-translatable: Non-translatable segments are marked with the letter “N” and appear in the place of a populated match value. You can manually assign the “done” status to a non-translatable segment in the status context menu. The segment status can be changed to translatable at the stage of correction.
	At LQA step: To be corrected. This status is visible to correctors only.
	At LQA step: Incomplete in this and previous steps. This status informs a corrector that a segment was not finished in the previous step and does not require verification.

Segment icons

	Processing
	QA warning in the segment
1	Indicates one of the XLIFF:doc statuses: -1: Rejected, 1: New, 2: Translated, 3: Proofed, 4: Validated
	Locked segment
	Alternative translation
	Not approved status of TM or Concordance match
	Accept and insert match
	Edit
	Remove
	Go to previous segment with comment
	Go to next segment with comment
	Add comment
	Add term
	Open Terminology
	Restore
	A comment has been added to the segment; if more than one comment has been added, still only one icon will be displayed.

N	Non-translatable
R	Repeated segment
✓	Insert match without inline tags
{✓}	Insert match with inline tags
TM	Segment won't be saved in TM
100%	Leveraged match 100%
ICE	In-context exact match
MT	Machine translation matched
M	Unpopulated match

The letters in the status box refer to the original matching type and have the following meaning:

LETTER	MATCHING TYPE
U	Unmatched
MT	Machine translation matched
M	Matched, unpopulated
ICE	In-context exact match
N	Non-translatable

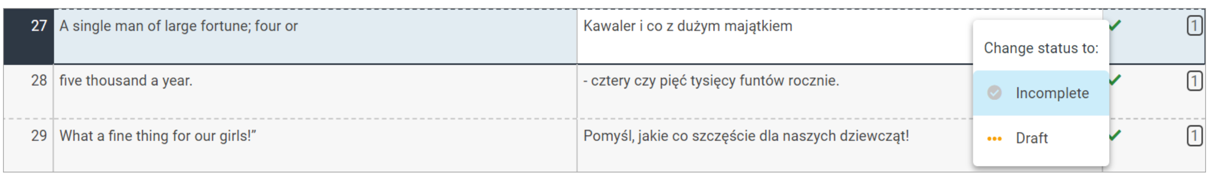
The only change that you can make to the letter in the status box is to change it to "N", otherwise it remains the same throughout the workflow.

Changing the status of segments

You can set XTM to change the segment status automatically upon pressing the Enter button. In this case, status validation with the Enter button takes you to the next unvalidated segment. Alternatively, you can manually set the status.

If the status change is not set to automatic, then you may change the status by:

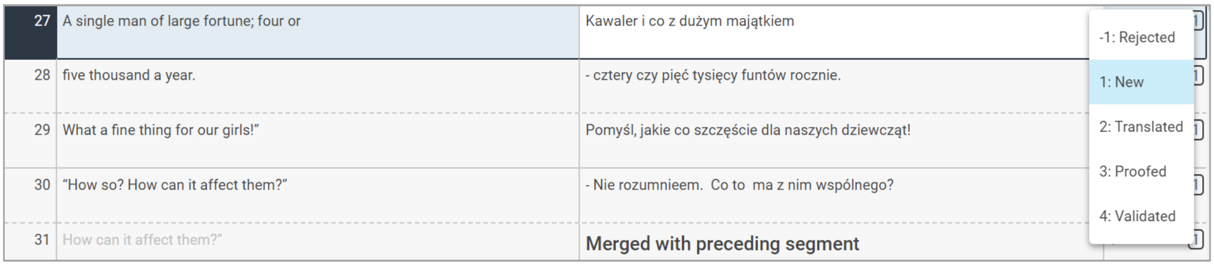
- using the keyboard shortcuts configured in the Settings > Shortcuts > Translation/Target menu
- selecting the icon in the box itself and selecting the statuses from the context menu.



Changing the status of a segment

XLIFF:doc status of segments

If you have TIPP switched on in Configuration > Settings, the XLIFF:doc segment status will be displayed in XTM Workbench to the right of the standard XTM status. To change the XLIFF:doc status of a segment, select the number and select the desired status from the pop-up list.



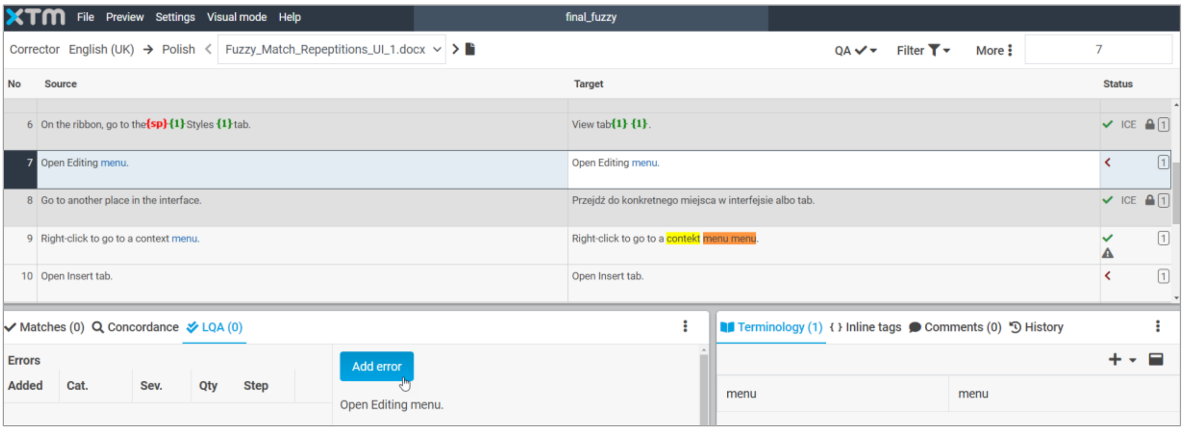
Changing the XLIFF:doc status of a segment

LQA in Workbench

When LQA has been activated in a step, an LQA tab appears in the XTM Workbench docked panel. The user performing the LQA can then easily select the error and choose a severity.

Adding LQA errors:

1. Select Add error to open a popup window.
2. Choose category, severity, and the number of errors in particular category.
3. Select Add error and continue evaluation in the segment.
4. Select Add error and close to close the popup window, if you have finished evaluation in the segment.



Performing LQA in XTM Workbench

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

Note: In the Simplified Mode, the LQA panel cannot be selected to be hidden from view at the system or user level.

Visual mode in XTM Workbench

The XTM Visual mode in XTM Workbench is available for

- HTML
- XML
- InDesign (recommended IDML file format)
- PDF
- Word files (docx)

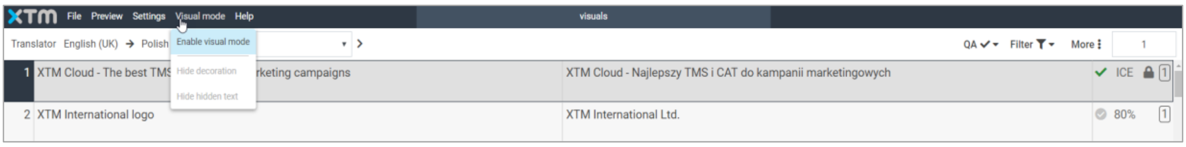
Note: InDesign is a paid feature and requires a special connector with XTM. Contact our Support Team for more information (support@xtm.cloud).

Depending on the type of XML file, in order to view XML files in the Visual mode it is necessary to configure the system with the relevant XSLT style sheets, prior to creating the project.
The XTM International support team can provide assistance to do this.

The aim of the XTM Visual mode is to show you a preview of the source and target file and then allow you to Select the text in the preview and enter a translation in the section below. The target preview is immediately updated with the translation. This allows you to see the full context of your translation as you are working. Note that clicking target segments will not take you to the corresponding text in the visual mode preview.

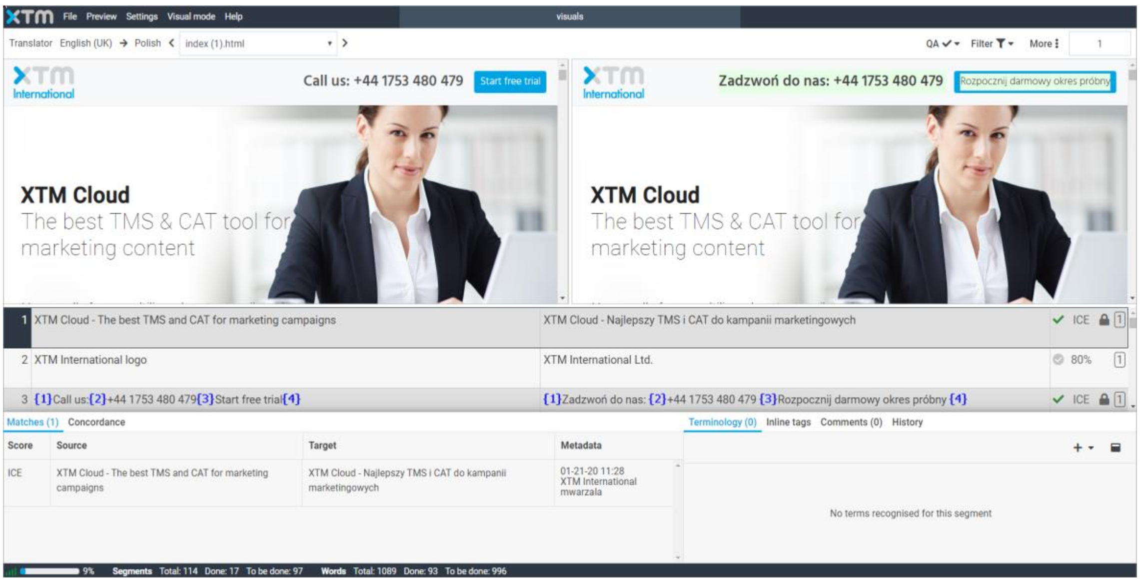
Enabling Visual mode

When XTM Workbench detects an HTML, XML or InDesign file, the option Enable visual mode option becomes clickable.



Switching the visual mode on

Working in Visual mode

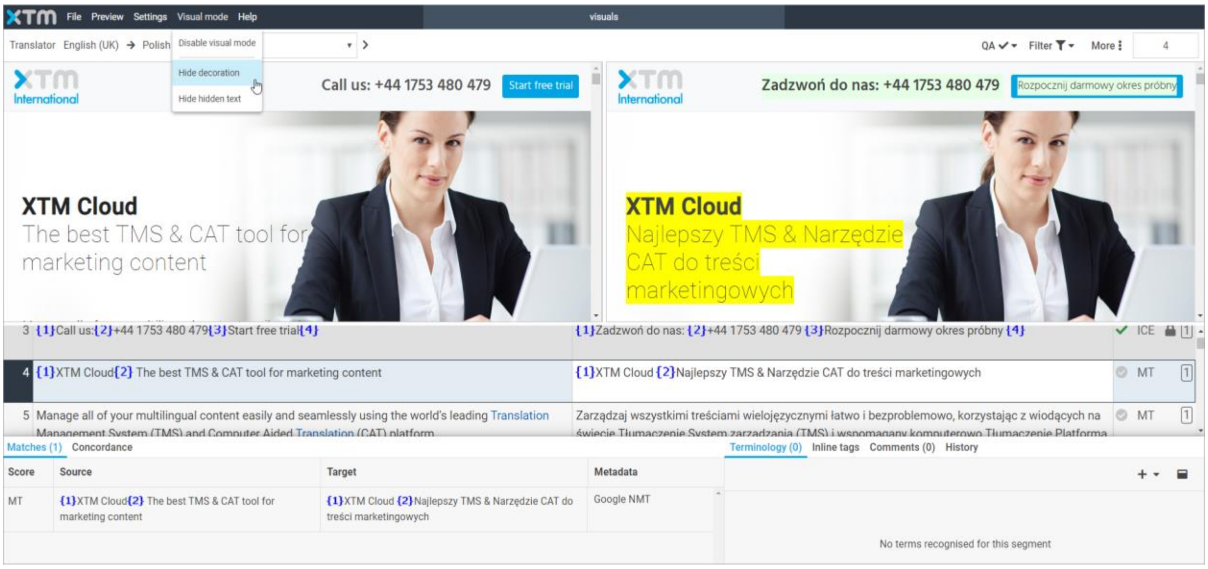


Visual mode

The layout of the page can be customized by using dragging the frames. This allows you to allocate the appropriate amount of space to the previews and the segment editing section.

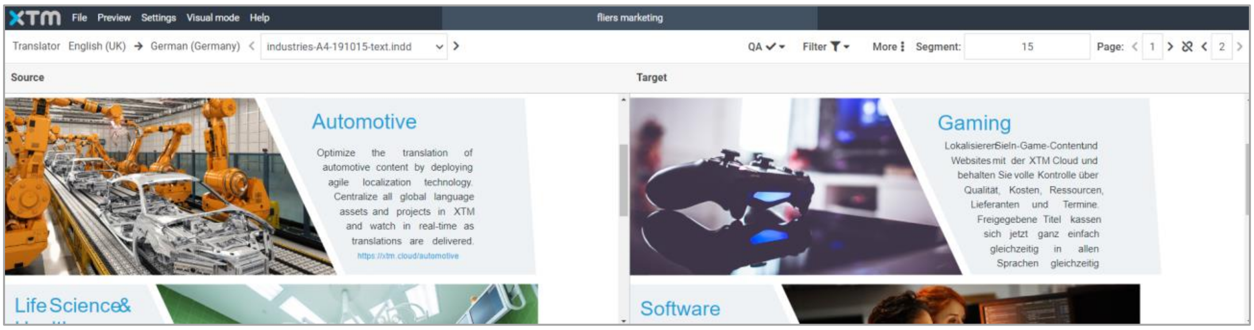
You can choose to view the text decoration (Option: View/Hide decoration in the top bar menu). When you Select the sentence in the Visual mode it is highlighted in yellow and you are taken to the corresponding segment in the workspace.

You can choose to display or hide Image alt texts in XTM Visual mode (Option: Show/Hide hidden text).



Visual mode – editing a segment

If the segments from the workspace are not displayed in the Visual mode, select the Update preview button to update the view.



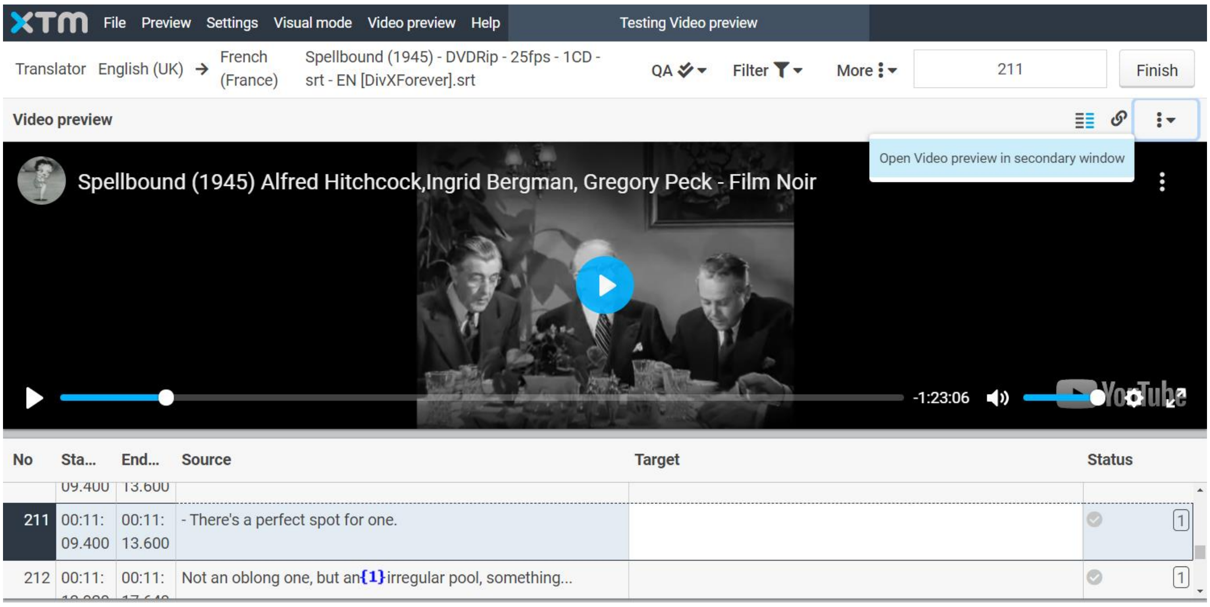
Source preview unlinked from target preview

Video preview

Video preview allows linguists to see subtitles in-context. Once the subtitles file and the video link have been added in the Project Editor, you can start translating subtitles in XTM Workbench.

Using Video preview to translate subtitles in XTM Workbench

1. In XTM Workbench, select Video preview from the top menu bar.
2. At the top of the Video preview panel, select the right-side option from the multiple bar menu to use the Display target as subtitles in the video preview.



Video preview in XTM Workbench

Resizing Video preview panel

The Video preview panel can be resized to suit your workspace.

You can also open the panel in the secondary window.

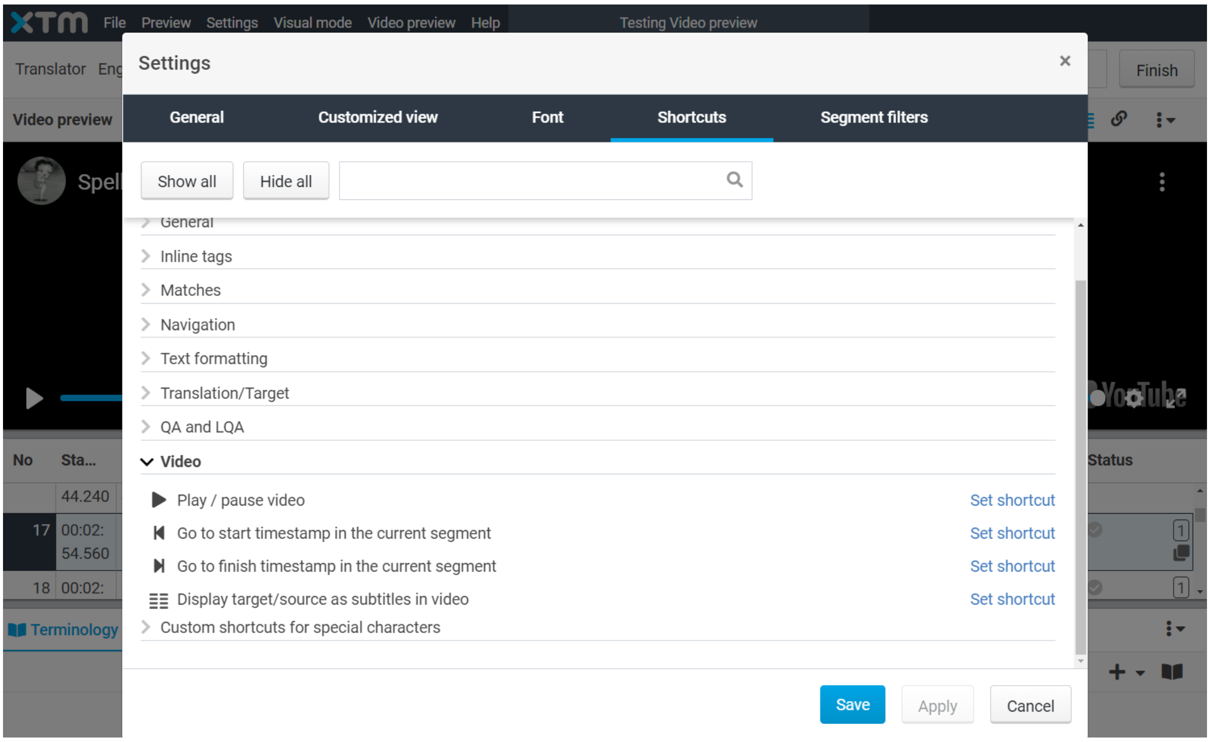
1. Select the three-dot menu at the top of the Video preview panel.
2. Select Open Video preview in secondary window.

Setting up shortcuts for Video preview

To speed up the translation process you can set custom shortcuts to play or pause video and to add timestamps.

1. In XTM Workbench, go to Settings > Shortcuts > Video and set a shortcut.

Make sure that the translated subtitles are correctly aligned with the video.



Shortcut options for Video preview

XTM - MS Word spelling checker

The *XTM - MS Word spelling checker* enhances the spelling checker feature in XTM Workbench. It connects with the MS Word and makes use of its spelling checker.

Note: XTM - MS Word spelling checker is not supported on Mac OS.

Prerequisites:
MS Word installed on the user's computer (ver. 2016 or up)
configuration of the XTM account (for configuration see: here; for installation see: here).

When activated, it will be part of the standard QA mechanism in XTM in which requests are sent to MS Word spelling checker to analyze content. MS Word then sends back a list of errors and suggestions on how to correct them.

To fully appreciate the proofing benefits of the MS Word spelling checker in your language combinations, you need to have a language accessory pack installed for MS Word. For more instructions check Language Accessory Pack for Office Microsoft support page.

If any language variants are not available, XTM will rely on the parent language. If your languages are not supported at all, XTM Spelling Checker will be automatically applied.
For the list of languages supported in MS Office, check Language identifiers and OptionState ID values in Office 2016.

Installation of Microsoft Word spelling checker

Installing Microsoft Word spelling checker on your PC:

1) In XTM Workbench, go to Settings > General > QA.
2) Select Microsoft Word from the Use spellchecking tool dropdown.
3) Open the tooltip and select the link in the QA tooltip to download the app.
4) Double-click the downloaded installation package.
5) Accept the End-User License Agreement.
6) Choose the default folder for installation.
7) Install the spelling checker.
8) The installed app is available on the OS bottom panel.

Installation wizard

Configuration of XTM - MS Word spelling checker

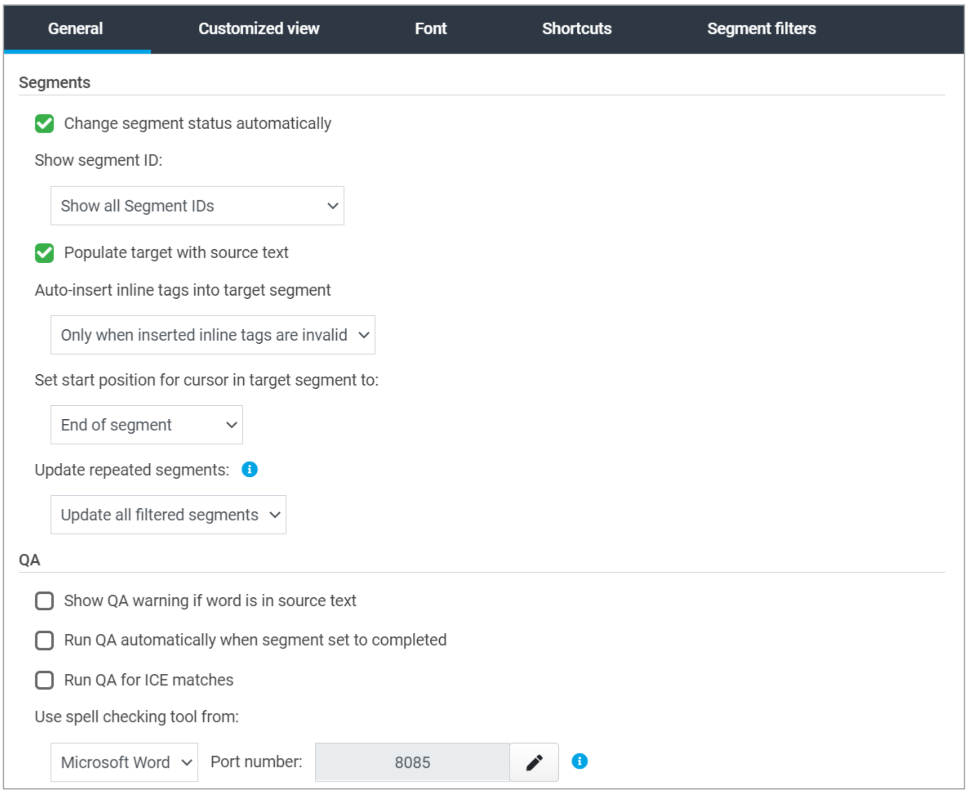
Configuration is performed on two levels: the system (Settings) and customer (XTM Workbench) levels.

Enabling the MS spelling checker:

1) Go to Configuration > Settings > Translation > Workflow and access.
2) Under the Workflow and access tab, find Linguist general options.
3) Tick the checkbox by the Allow linguists to use Microsoft Word Spelling checker.
4) Scroll down to Linguist workflow options and tick the checkbox by Check inconsistency when linguist finishes any step.
5) Choose Spell & QA.
6) Optionally set up a message that will be displayed when inconsistency is found.
7) Select Save.

Setting up the MS spelling checker in XTM Workbench:

1) Open XTM Workbench.
2) In the top navigation bar select Settings > General.
3) In the QA section, set the spell-checking tool to Microsoft Word.
4) Upon selection an additional field appears with an assigned port number. It is important to leave the entry unchanged.
5) Select Save (to keep your changes and leave the popup) or Apply (to save your changes and stay in the popup).



XTM Workbench settings – selecting a spell-checking tool

Right to Left languages

The following languages are automatically set to display right to left in XTM Workbench:

- Arabic
- Hebrew
- Divehi
- Pashto
- Persian
- Syriac
- Urdu
- Yiddish
- Yiddish, Israel

For PCs running Microsoft Windows, to change the keyboard firstly ensure that the desired language is installed. This is done in Control Panel > Region and Language > Keyboard and Languages. Once installed it is possible to select the desired language from the pop-up menu at the bottom right of the screen.

Bidirectional texts

When you need to type some text in direction opposite to the direction of the target language, you can use text direction marks.

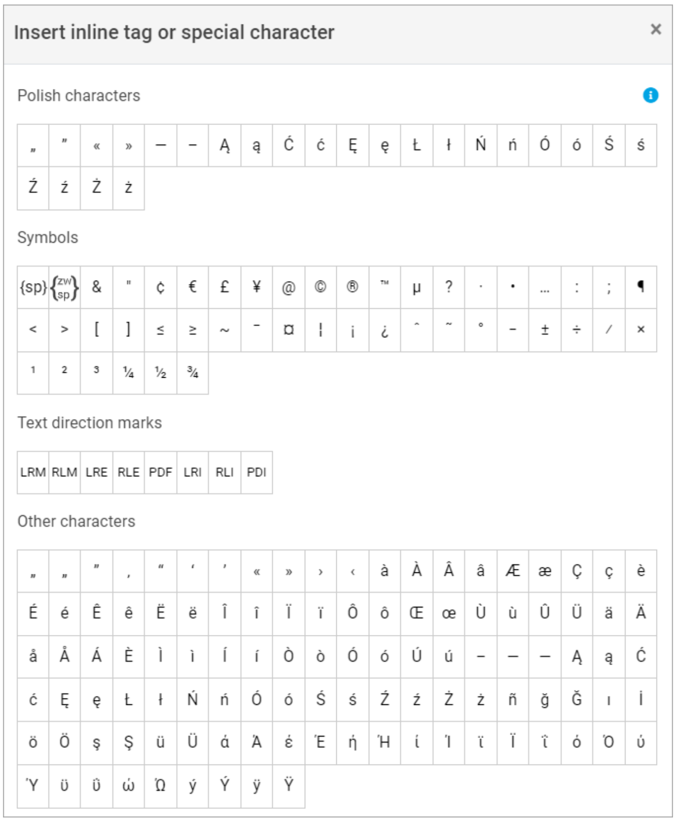
How to change the direction of a fragment of text in XTM Workbench

1. Select the relevant segment in XTM Workbench, go to the More menu ⋮ > Insert inline or special character > Text direction marks.

Bidirectional marks available in XTM:

<table>
<tr><td>LRM</td><td>Left-to-Right Mark</td><td rowspan="2">Invisible formatting characters used to set control over direction of the text</td></tr>
<tr><td>RLM</td><td>Right-to-Left Mark</td></tr>
<tr><td>LRE</td><td>Left-to-Right Embedding</td><td rowspan="2">Indicate that a fragment of text is to be treated as embedded, e.g. an English phrase in an Arabic sentence could be marked as embedded left-to-right.</td></tr>
<tr><td>RLE</td><td>Right-to-Left Embedding</td></tr>
<tr><td>PDF</td><td>Pop Directional Format</td><td>Indicates that the scope of the previous embedding (LRE, RLE) is over</td></tr>
<tr><td>LRI</td><td>Left-to-Right Isolate</td><td rowspan="2">Indicate that a fragment of texts is isolated from the other part of the sentence</td></tr>
<tr><td>RLI</td><td>Right-to-Left Isolate</td></tr>
<tr><td>PDI</td><td>Pop Directional Isolate</td><td>Indicates that the scope of the previous isolate (LRI, RLI) is over</td></tr>
</table>

LRM, RLM, LRE and RLE are opening text direction marks. LRM and LRE change text direction to left-to-right. RLM and RLE change text direction to right-to-left, while PDF is a closing mark. The LRM and RLM characters allow for a very granular control over the directionality of the text and are enough to solve any BiDi issues. However, sometimes there is a need to embed LTR or RTL section in a paragraph with different directionality and controlling everything with the LRM and RLM control character might not be the most efficient solutions in terms of time and effort. This where the Left-to-Right Embedding (LRE), Right-to Left-Embedding (RLE), and the Pop Directional Formatting (PDF, not to be confused with the file format) marks come into play. The LRE or RLE marks are placed at the start of the embedded section and the PDF mark is placed at the end of the embedded section to signal the end of the embedding. Alternatively, the embedding also ends when the opposite LRE or RLE mark is parsed, or at the end of the paragraph.



Text direction marks in the Insert inline tag or special character window

Special Unicode characters

General punctuation characters: spaces, format characters and dashes

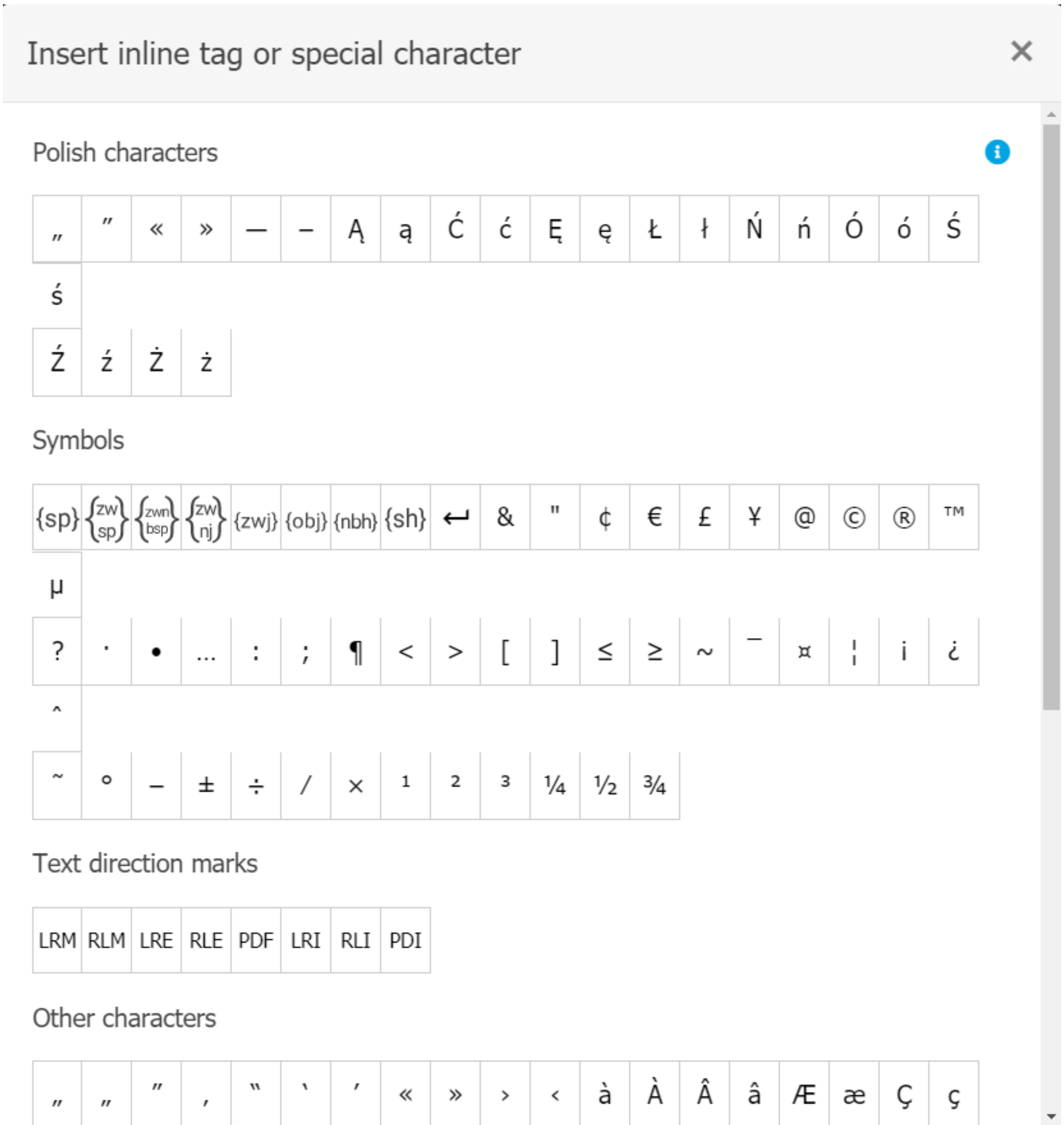
You can use following spaces, format characters and dashes in XTM Workbench:

- Zero Width No-Break Space
- Zero Width Non-Joiner
- Zero Width Joiner
- Object Replacement Character
- Non-Breaking Hyphen
- Soft Hyphen

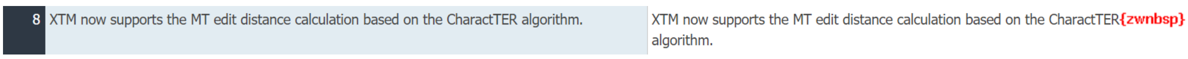
Unicode character	**Abbreviation: as seen in Workbench**
Zero Width No-Break Space	{zwnbsp}
Zero Width Non-Joiner	{zwnj}
Zero Width Joiner	{zwj}
Object Replacement Character	{obj}
Non-Breaking Hyphen	{nbh}
Soft Hyphen	{sh}

To Add a special Unicode character to a target segment:

1) Press **alt + 0** to open the Insert inline tag or special character popup.
2) Select the required character
3) The character is marked red in the target segment.



Insert inline tag or special character



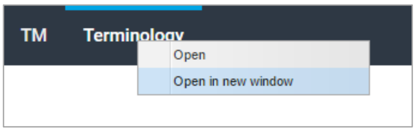
Zero Width No-Break Space in the target segment

7. XTM Terminology

General description

XTM incorporates a comprehensive terminology module. This is a database of your terms which includes a concept, definition, context, image, multilingual translations, and remarks. In XTM Workbench, the system identifies and highlights terms in the source text that are in the term base. Approved translations for terms recognized in the active segment are displayed in the docked panel. On hover, more term details are displayed. This feature facilitates a consistent use of the agreed terminology during translation. Users can import and export the terminology in XTM and edit or add new terms directly from XTM Workbench. You can also add custom tags to terms for a more detailed categorization and display related terms.

For easy access it is possible to open Terminology in a separate window. You can do this by right clicking the tab and selecting “Open in new window” from the context menu.



Right clicking on the Terminology tab

The Manage tab is where you can find, add, modify or delete concepts or terms from a customer’s termbase. You can browse, filter or search for terms to update them and edit them as required.

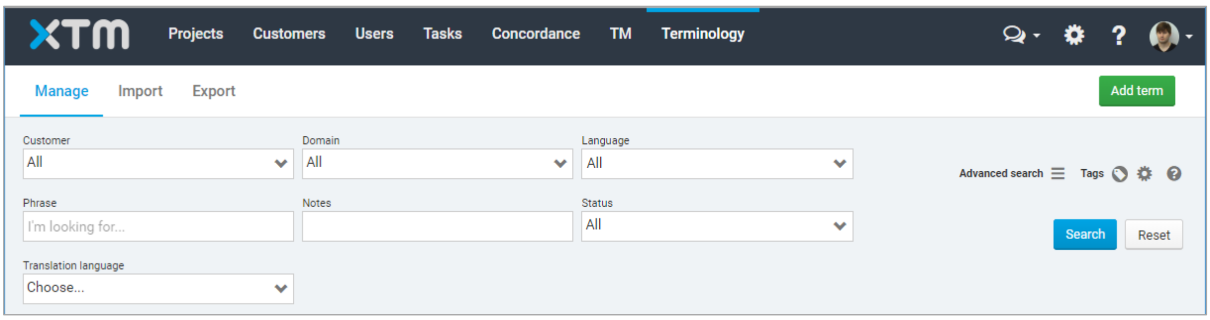
The Import tab enables you to create, update or synchronize termbases by importing terminology lists from external sources. The file formats that can be imported are XLS, XSLX, TBX and MTF. XTM stores a history of terminology imports so that you will have a record to track changes to your termbase.

The Export tab is where you can download terminology lists to several standard file formats, XLS, XLSX, TBX and MTF, for review or exchange. XTM stores a complete export history so that you will have a record to track changes to your termbase.

Searching for terms

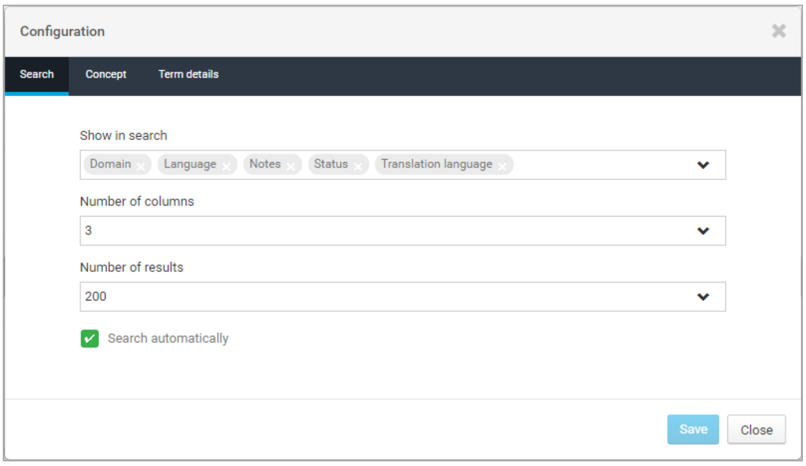
You can find and view a set of terms by selecting values in the Search area at the top of the window. You may narrow the search by entering one or more customers, languages and other configurable field values or enter a specific text string to search for in the Phrase field.

Terms that match your search criteria are displayed in the search results list box on the left side of the screen. You can export the search results directly from the Manage tab by clicking the export button above the term list.



Searching for a term in XTM Terminology Manager

Fields available in the standard search and their layout can be controlled using terminology configuration. There, you can choose additional search criteria, such as who it was created by (Created by), when it was created (Created at), who it was modified by (Modified by), when it was modified (Modified at), whether it has suggestions, or search by notes or the id of a concept or a term. Also, the number of columns in which the fields are arranged can be selected, the number of results displayed on a single search results page can be changed or the automatic search can be disabled.



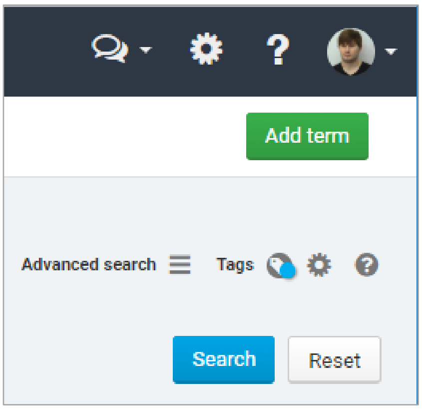
Terminology search configuration

Advanced search

To find terms using more sophisticated search criteria, open the Advanced search and fill in the fields as required. A blue dot indicates that some advanced search conditions are applied to the standard search.

Using term tags

In addition to the standard and advanced search criteria, terms can be filtered by tags. The list of available tag filters depends on tags created under Configuration > Data > Tags > Tags.
A blue dot indicates that some tag filters are applied to the standard search.

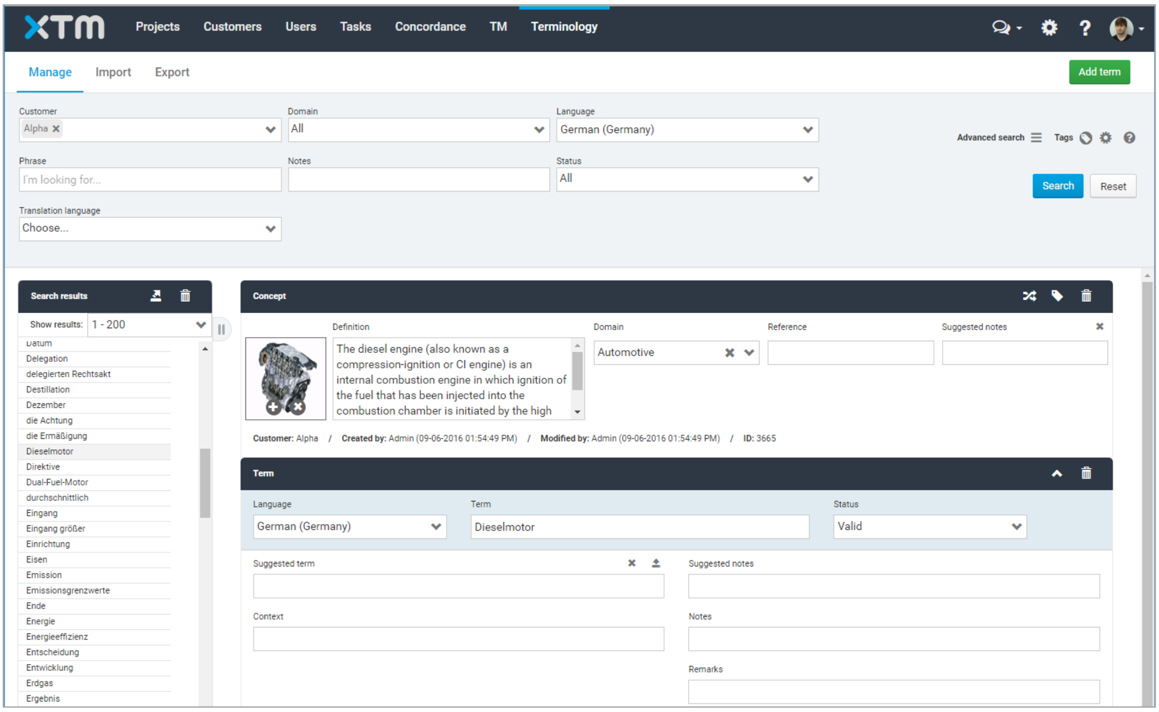


A blue dot denoting that tag filters are applied

Select the tag icon next to the concept and select from the available tag groups and tags in the dialog to assign tags to the concept. Tags can also be assigned to concepts in a batch when selected during import of a terminology list or used as criteria for searching term bases. You can delete tags from concepts by clicking on the X next to the tag that is displayed at the bottom of the concept details.

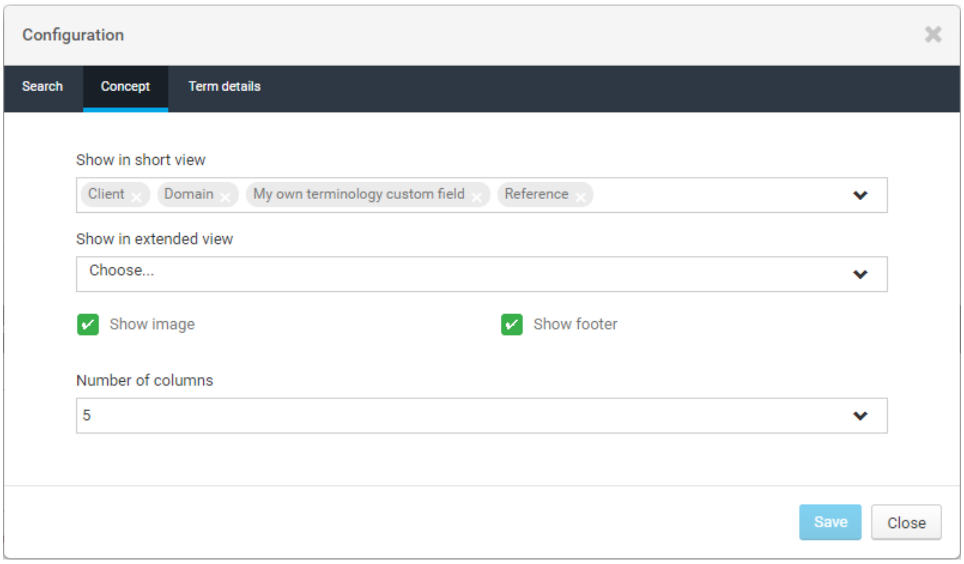
Displaying terms

Clicking on a term in the list displays its concept, metadata and translations on the right-hand side.



Viewing a term in the Terminology Manager

Similar to the standard search, Concept and Term details views can be customized using terminology configuration. This provides control to select fields visible in the short and extended views, options to show the concept image or the footer, and to change the number of columns in which the fields are arranged.



Term concept display options

The selected fields together with the added information will be made available to linguists working in the XTM Workbench with the exception of the Note field that is meant for notes to terms visible only in the Terminology module.

Any active custom Terminology fields created in the Configuration tab will be available for choice from the dropdown list below the option Show in extended view.

Adding terms

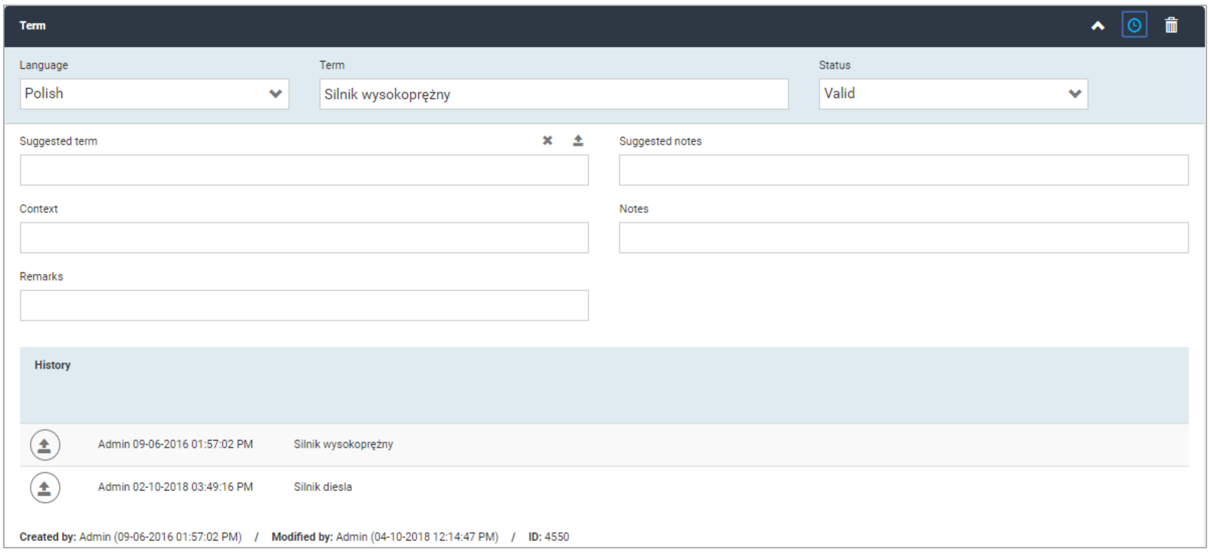
You can add a term in the Manage tab by clicking Add term in the top right corner of the window. Enter the details of the term, its translations, the approval status, and then click Save. Additional translations can be added to an existing term by clicking on the Add new translation button and then clicking Save.

Also, a picture can be uploaded to a term concept to illustrate it. Pictures can be added in the jpg, jpeg, bmp, png or gif file format. The maximum file size is 25 MB. High resolution pictures will be downscaled to the maximum supported picture resolution of 600 × 600 px.

Terms can also be added directly from within XTM Workbench. Select the desired term in XTM Workbench right Select it to bring up the context menu and select one of the Terminology options: “Add term – quick” to add the term with minimal information, “Add term – full” to add more term details, or “Open terminology” to open the full terminology manager window.

Editing terms

You can edit terms either from the Manage tab or directly from within XTM Workbench. In the Manage tab search for the term you want to change and select it. Make the change and click save. To see the history of changes, click the clock icon . You can restore a previous version of a term by selecting it and clicking the restore icon.



The history of a term

Approving terms

Users with Update and Approve terminology privileges can approve terms suggested by linguists during translation. You can approve terms by searching on the Manage tab for Not approved terms and changing the terms’ status to Valid. When specific terms are undesired in the translation, you can set their status to Forbidden or Rejected. These terms will be displayed in red in XTM Workbench.

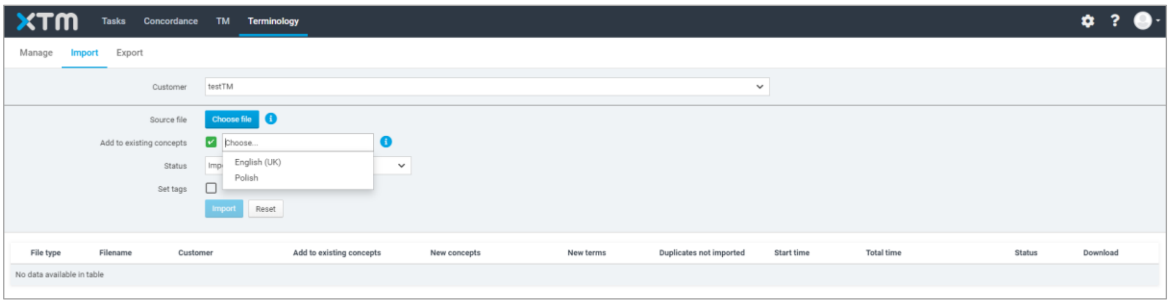
Deleting terms

In the Manage tab you can delete individual language translations of a term by clicking on the trash can icon to the right of the translation details. You can also delete the concept with the associated term and all of its translations by clicking the trash can icon to the right of the concept details and clicking “Yes” in the confirmation dialog.

All found terms can be deleted in one go by clicking the trash icon in the term search results section.

Importing terms

On the Import tab you can select a customer and import one of several standard file formats, XLS, XLSX, TBX or MTF, to create or update a customer term base.

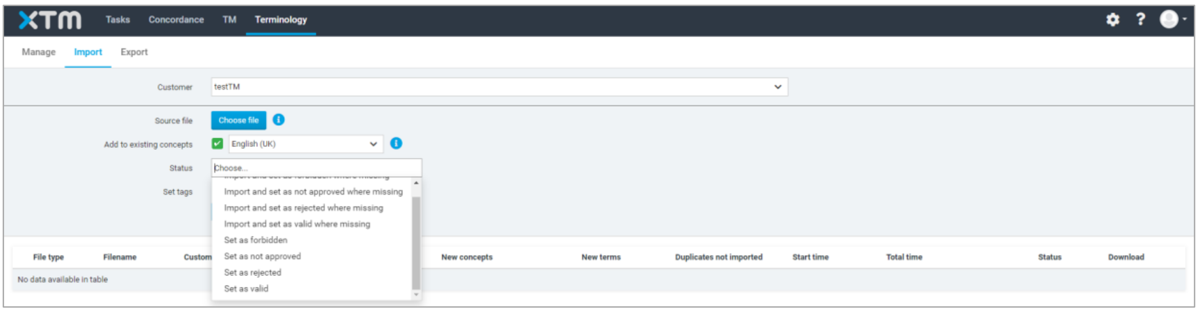


Terminology > Import screen

Columns with terminology translations should have UTF-8 language code headers. The list of UTF-8 language codes supported by XTM is available in Language codes. The import file has to contain at least a list of terms and their translations. Other term fields are optional.

It is possible to set terms statuses at the import. In such case a “status” column has to be included in the import file with one of the following statuses: VALID, REJECTED, FORBIDDEN or NOT_APPROVED. Date format supported in the import is the following: yyyy-mm-dd hh:mm:ss. Pictures to term concepts are an exception and cannot be imported.

You can choose to add duplicate terms to existing concepts in a term base rather than creating new concepts from them by clicking the “Add to existing concepts” checkbox and selecting the language to analyze for duplicates.



Terminology import status options

You can set the status for all imported terms. If terms in the import file include statuses, the statuses can be imported. It is possible to specify the status that will be set to terms without a valid status in the import file. Also, terminology lists to be imported can be tagged during the import to improve terminology categorization.

Add translation to existing concepts

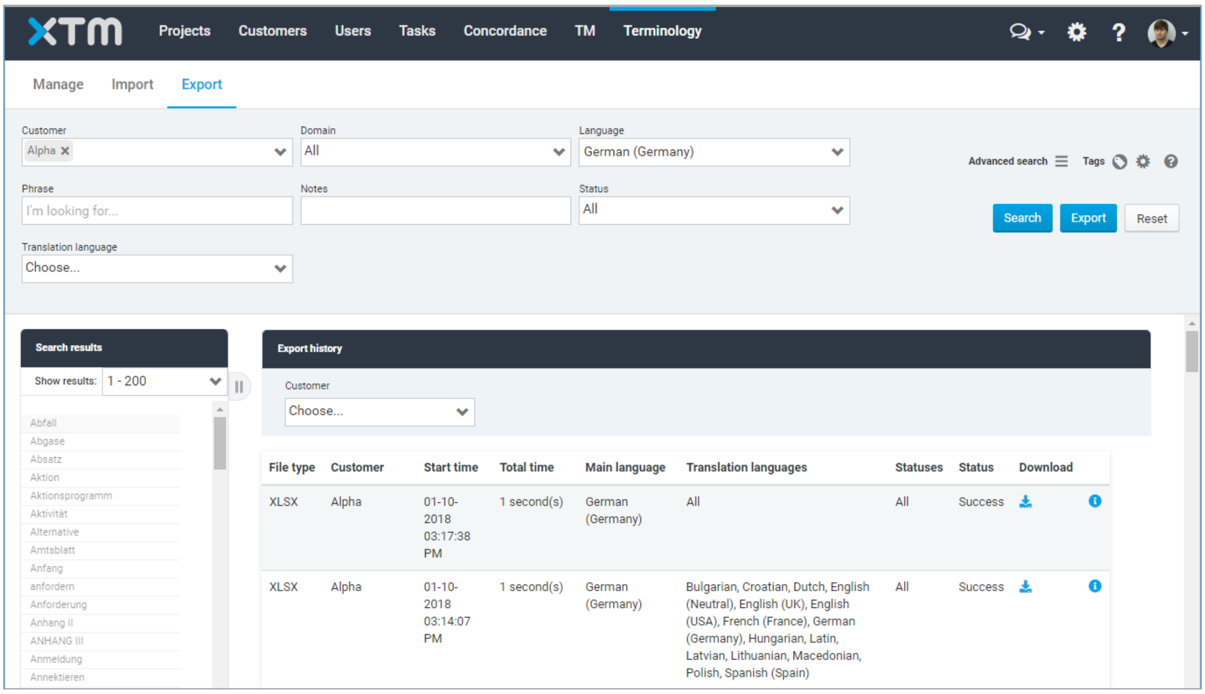
All terms in XTM are linked to a concept and so when you add a translation for a term it is stored in the term base and linked to the concept.

When you import terms and you do not select “Add to existing terms” a new concept will be created for each row of terms irrespective of whether one or more of the terms already exist in the term base.

If you check “Add to existing concepts”, a new dropdown field will be displayed with a list of languages.

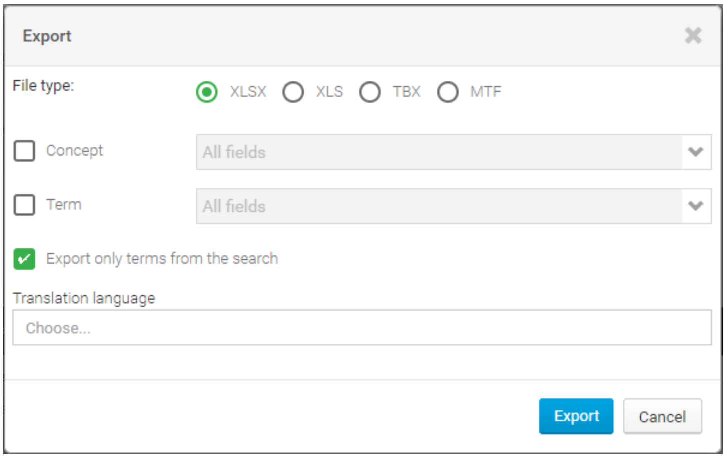
Exporting terms

On the Export tab you can download terminology lists to several standard file formats, XLS, XLSX, TBX and MTF, for review or exchange.



Terminology > Export screen

You can freely configure the data to be included with the terms from among the comprehensive set of fields and tags that XTM offers. In addition, terms can be filtered before the export by choosing a translation language or deciding to export only terms from the search. Pictures to term concepts are an exception and cannot be exported.



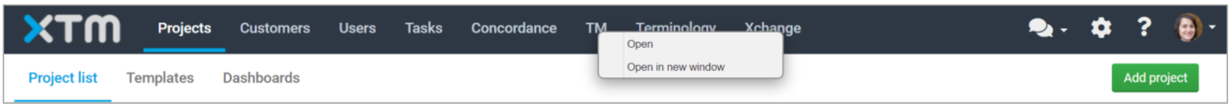
Terminology export options

Terms found using the search can be exported from the Manage tab too using the export button in the search results section. Also, there is a terminology export history that lists export details and provides an option to download the exported file.

8. XTM TM Manager

The TM Manager window is the place to import, edit, and export your translation memory.

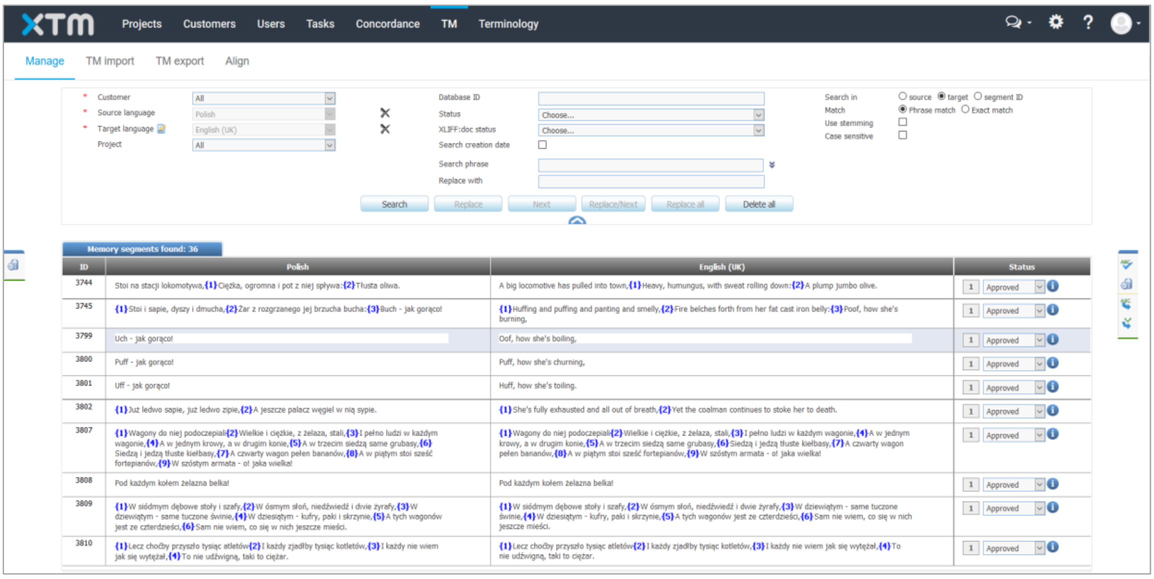
For easy access it is possible to open TM Manager in a separate window. You can do this by right clicking on the tab and selecting “Open in new window” from the context menu.



Right clicking on the TM tab

Finding and editing segments in the TM

Select the TM tab. In this screen you can search for and modify segments, perform quality assurance including the spellchecker, and import and export translation memory as either a TMX file or an XLIFF file.

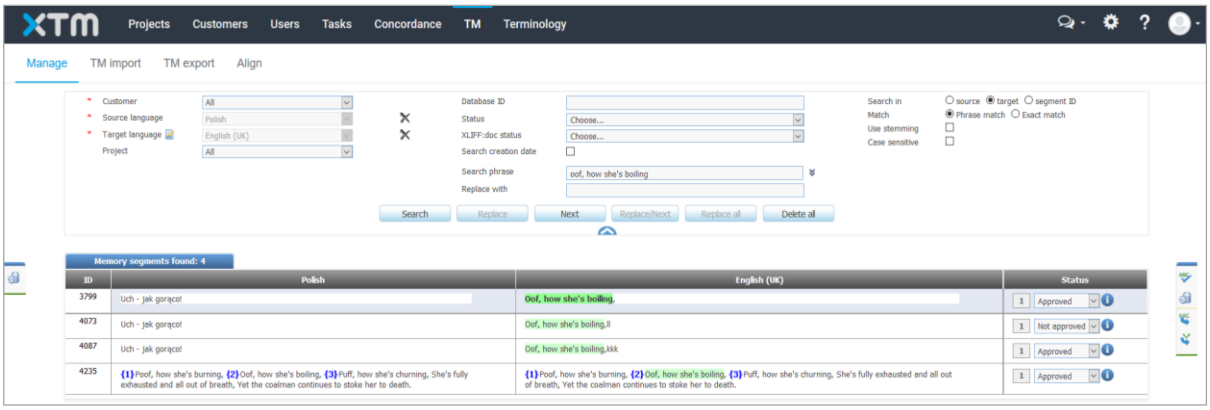


TM Manager

The translation memory is tagged by customer, project and document so it is first necessary to select the customer for whom you wish to run the TM Manager.

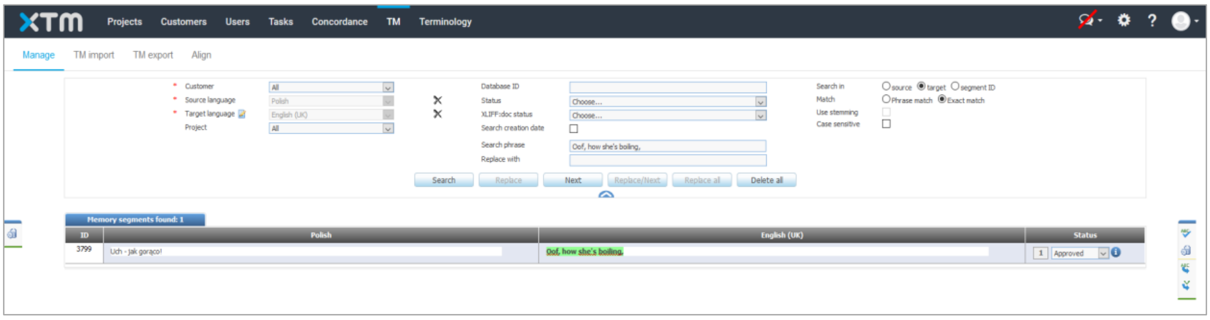
You can specify the match type by selecting either:

- Phrase match
- Exact match



Phrase match

With Exact match enabled, you can find the exact sequence of characters that you are looking for. To improve the accuracy of this option, you can enable the Case sensitive box.

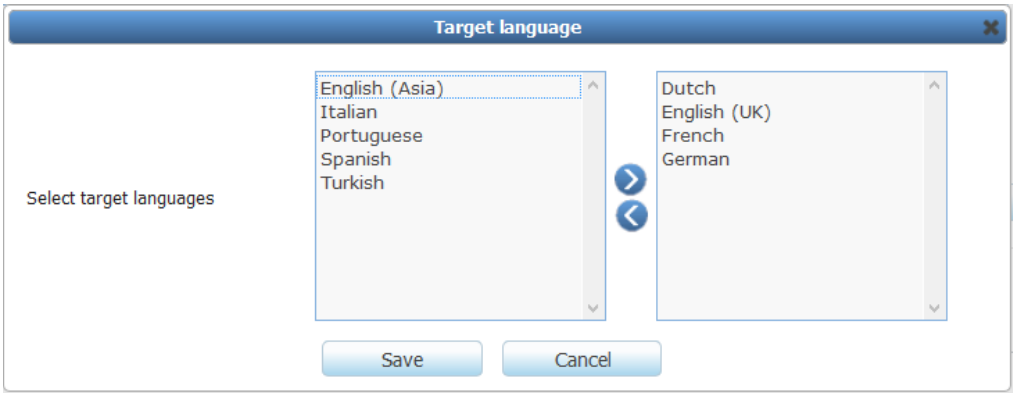


Exact match

Next carry out a search to find the segments that you wish to manage by entering the search criteria and Select the Search button.

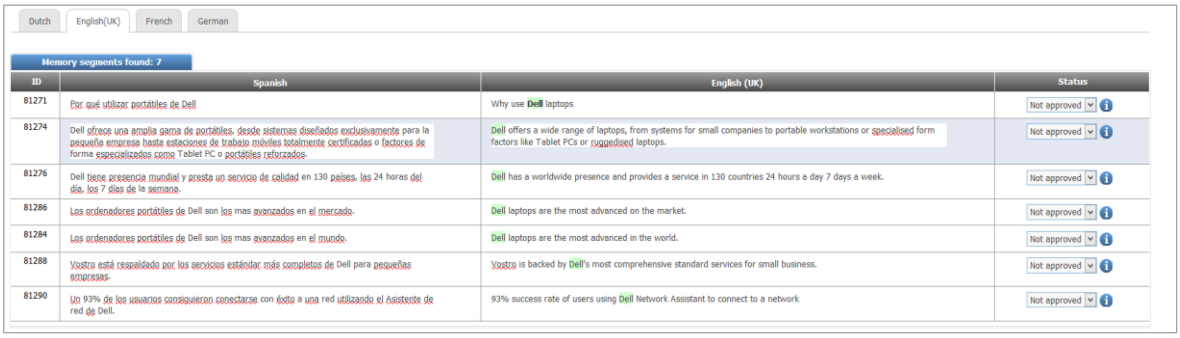
It is possible to search by the following fields: customer, source language, project, target language, one or more segment IDs, status, creation date and phrase. If you enter a search phrase you need to specify whether you are searching in the source or target segment. You can also have the option of using stemming in your search and setting whether you want the search to be case sensitive or not.

You can search for multiple target languages at one time by clicking on the edit icon which brings up the multi- select window.



Selecting multiple target languages in TM Manager

When multiple target languages are selected the results are shown in different tabs.



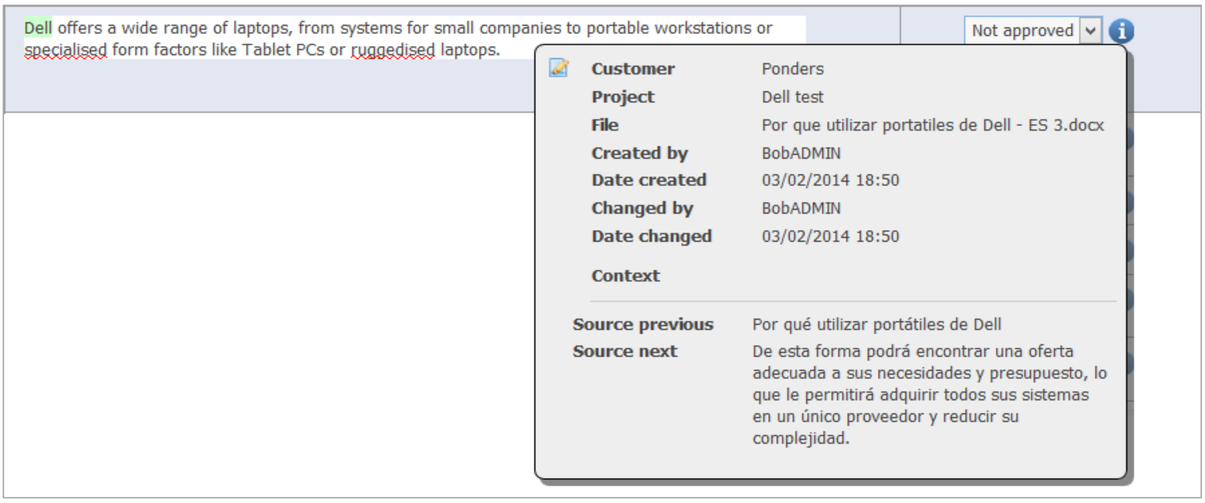
Viewing multiple target languages in TM Manager

The number of segments found and the segments themselves are displayed in the lower half of the screen.
The two TM segment statuses created in XTM are:

- Approved – which are final and approved translations
- Not approved – translations which are still being worked on and have not been approved at any stage of the workflow.

Hovering over the information icon displays any meta-data stored with the segment including:

- Customer
- Project
- File name
- Created by
- The date created
- Modified by
- The date modified
- Tags associated with the segment
- The context of the segment.



Segment metadata popup in TM Manager

Once you have found the desired segments you can edit either the source or target phrase manually, change the segment status or use the find and replace feature. To use find and replace enter the word or words to be changed in the “Search phrase” field and the word or words to replace them in the “replace with” field. Then use a combination of replace and next buttons or the replace/next button to work through the segments. If you want to replace all the segments in one go without checking them further, click the “Replace all” button. XTM will display a message to say how many segments have been changed.

If you wish to delete all the found segments, click the "Delete all" button.

Left-hand toolbar

The left-hand toolbar relates to all the segments displayed on the current page.

Icon	Action
	Delete all segments on this page

Right-hand toolbar

The right-hand toolbar relates to individual segments.

Icon	Action
	Performs QA check on current segment
	Deletes current segment
	Reverts to original target
	Reverts to original status

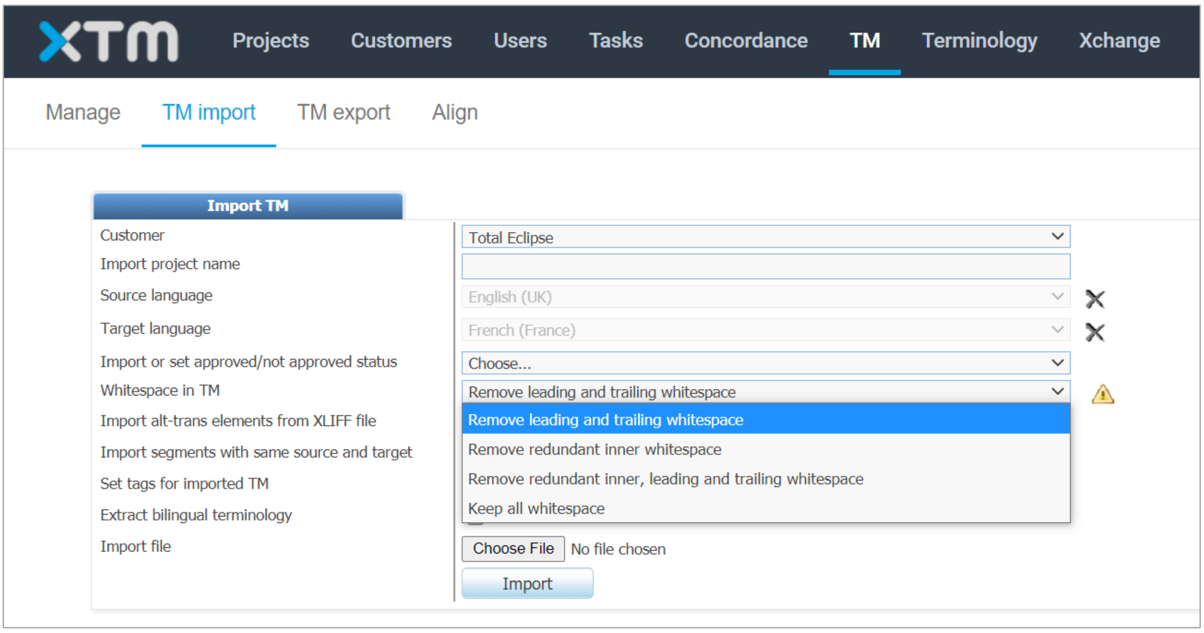
Importing a translation memory

Translation memories can be imported into XTM from a TMX, XLIFF or Excel file. For best results we recommend using the TMX v 4b format.

To import either a TMX, XLIFF or Excel file into XTM Select the TM import tab and select:

1) **Customer**: Select the customer name from the dropdown list.
2) **Import project name:** Give the import project a name.
3) **Source and target language**: Set the source and target languages
4) **Import or set approved/not approved status:** Set the status of the imported TM:
   - Set as approved
   - Set as not approved
   - Import statuses and set as approved where missing
   - Import statuses and set as not approved where missing
5) **Whitespace in TM** You can choose to keep or remove whitespace characters as required. This might affect the matching score.
   - Remove leading and trailing whitespace
   - Remove redundant inner whitespace
   - Remove redundant inner, leading and trailing whitespace
   - Keep all whitespace
6) **Import alt-trans elements from XLIFF file:** If you are importing an XLIFF file, check the box labelled "Import alt-trans elements from XLIFF file" if you wish to import the matching data that is stored in your XLIFF file.
7) **Import segments with same source and target:** Decide if you want to import translation units which have the same source and target texts
8) **Set tags for imported TM:** Set the tags for the TM you are importing
9) **Extract bilingual terminology**: You can extract terminology during translation memory import. For more information, check Extract bilingual terminology.
10) **Import file:** Select the browse button to locate the file you wish to import
11) **Import:** Click the Import button.

A new record in the import history section is created that displays the status of the import. The status changes from "in progress" to "done" when the import is complete.



The TM Import window

When importing a TMX file with tags, the proper syntax for a tag group and a tag is for example:

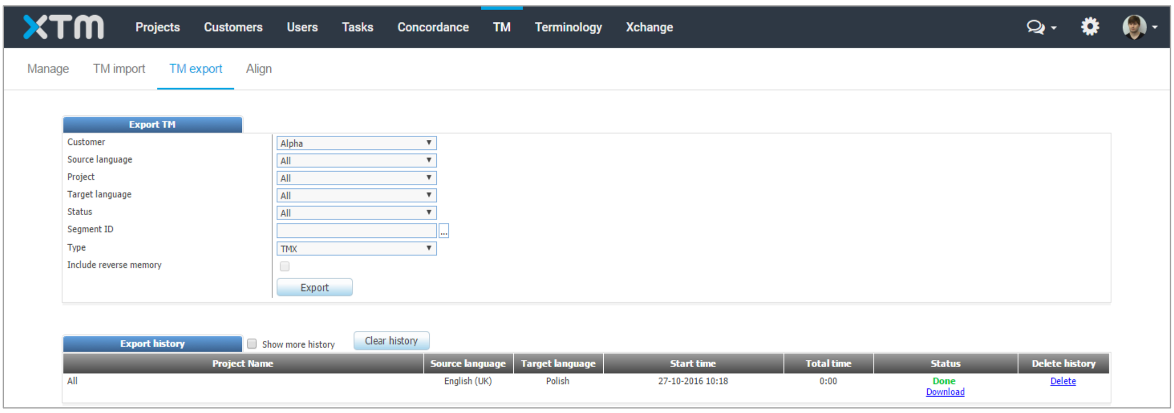
```
<prop type="Domain">Therapies</prop>
```

Where "Domain" is a tag group and 'Therapies' is the tag name.

The tag groups and tags need to be created in XTM before the importing the TMX file. The names of the tag group and the tag may only contain letters from the English alphabet, numbers, dash and underscore.

Exporting a translation memory

To export a translation memory, Select the TM export tab. You have the option of exporting all your TM or you may choose a sub-set based on the source language, project, target language and status. You can also choose to filter the export by specifying the segment IDs. Choose whether the export file type should be TMX, Excel or single language XLIFF and then click the Export button. The file is downloaded as a .ZIP. A history of the exports is displayed below.



The TM Export window

Exporting translation units based on their source file segment IDs

Select three dots next to the Segment ID input field to open a multiple Segment ID selection window.

Type or paste multiple source file segment IDs to the Segment ID window. Make sure to enter only one segment ID per line.

XTM Align

With XTM Align you can quickly and easily create bitexts from your previously translated documents. The bitext contains a source document and its translation aligned at the segment level. The bitext can then be uploaded as translation memory into XTM for use in future projects.

XTM supports Unicode emoticons in the bilingual terminology extraction and in the Aligner.

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

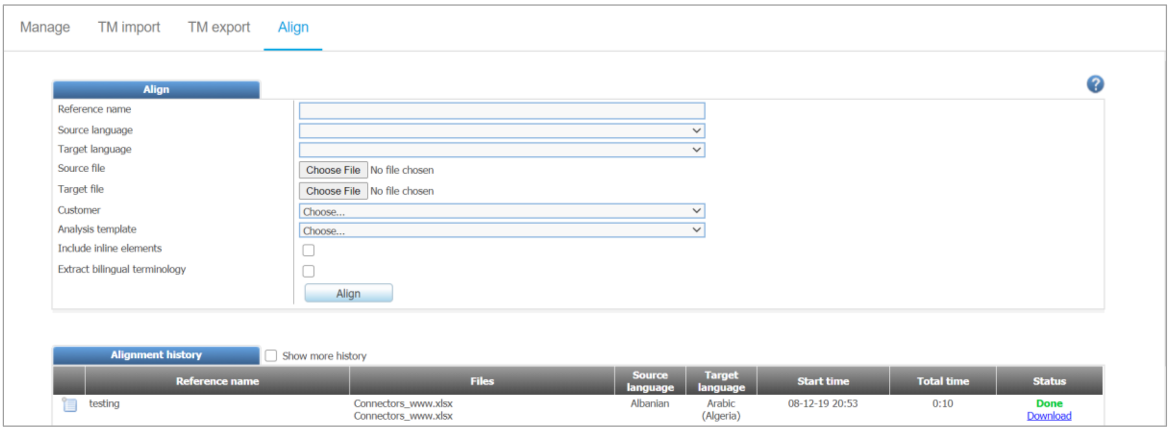
Aligning documents

Note: TM Align and bilingual terminology extraction are not available on freelance XTM accounts.

To align documents:

1) Type a reference name for this alignment process.
2) Set the source and target languages.
3) Upload the source and target files and optionally enter the customer's name.
4) Click the Align button.

The process of alignment may take some time depending on the size of the documents and whether bilingual dictionaries already exist in XTM or must be generated by the system. When the alignment is complete the status will change to "Done" and the Download button will become visible in the alignment history section. Clicking on this link downloads the Excel file containing the aligned text.



The Align window

XTM Align creates two Excel spreadsheets for each alignment:

- One with '90+' added to the name of the file contains only segments with a 90%+ probability of accurate alignment. This spreadsheet can be used to quickly check and upload the memory, as it requires only visual confirmation of the alignment without any further work.
- The main spreadsheet contains the full alignment details: individual cells can be deleted, and target text modified to reflect source text segmentation.

In the spreadsheet the source segments cannot be changed: they cannot be merged or modified in any way as they represent the way in which the source text has been segmented. The target segments can be modified to reflect the source segmentation if required, e.g., text from multiple cells can be merged into one corresponding cell.

Bilingual terminology extraction

Bilingual terminology can be extracted in an Excel format when parallel texts are aligned. Terminology extraction is an AI-driven process during which translated term candidates are automatically extracted along with their respective translation. As a result, a highly specialized dictionary is compiled, which contains terms in source and target, along with context metainformation.

Improved bilingual terminology extraction feature excludes generic words and terms that are already in the terminology of a given Customer. To extract bilingual terminology during alignment you need *align access rights.*

The bilingual terminology spreadsheet will be added to the two aligned files in the ZIP package and can be downloaded under the Alignment tab.

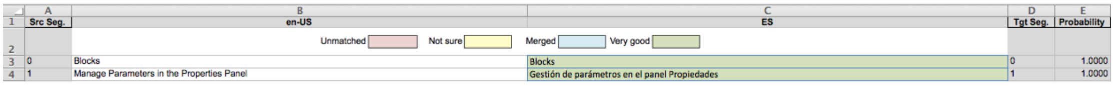
Check Language pairs available in terminology extraction.

How to extract bilingual terminology during alignment

1. Go to the TM tab and click Align.
2. Enter all the required information including a Reference Name, Source language, Target language and the Customer. Choose source and target files.
3. Select the Extract bilingual terminology checkbox. Click Align. You can download the file from the Alignment history section once the status changes to Done.
4. The downloaded folder contains the alignment result along with the extracted bilingual terms in a separate Excel file.

Excel file description

The output of XTM Align is an Excel file:



	A	B	C	D	E
1	Src Seg.	en-US	ES	Tgt Seg.	Probability
2		Unmatched Not sure	Merged Very good		
3	0	Blocks	Blocks	0	1.0000
4	1	Manage Parameters in the Properties Panel	Gestión de parámetros en el panel Propiedades	1	1.0000

The Excel file showing aligned text

The columns in the Excel file are as follows:

Column	Title	Contents
A	Src. Seg	The source segment numbers
B	Source language code	The source segment text
C	Target language code	The target segment text
D	Tgt. Seg	The target segment number
E	Probability	The probability score for the match on a scale from 0 to 1, where 0 indicates zero probability and 1 indicates an absolutely accurate probability

In addition, cells are given a colored background to reflect matching accuracy:

Color	Matching accuracy
	Unmatched cells in either source or target
	Uncertainty as to the quality of the match
	Text from multiple segments has had to be merged into one cell
	A very good match
	A good match

In all cases the alignment of the segments must be checked by a project manager or linguist prior to uploading the spreadsheet into XTM.

Correcting the alignment in Microsoft Excel

The rules regarding the correction of alignment in the spreadsheet are:

1. When deleting cells in either the source or target columns, always choose to ‘Shift cells up’.
2. You can only split or merge text in target cells.

Target language cell text can be split into multiple cells if required to reflect the translation of the source segments, e.g., target cell text that represents two or more source segments may be ‘retranslated’ to reflect the source segmentation. Text in multiple target cells can also be merged into one cell if required.

Source text can never be modified.

Uploading the TM into XTM

After you have completed the review and correction process in the spreadsheet, you can upload the TM into XTM via the TM tab using the TM Import upload option.

The following rules apply to empty source or target cells:

1. A source segment with no matching text in the corresponding target cell will not be uploaded.
2. A target segment with no matching text in the corresponding source segment will not be uploaded.
3. Empty source and corresponding empty target cells will not be uploaded.

Extracting terminology from a bilingual file without alignment

This option is available for enterprise users only.
You can extract terminology without alignment from these file formats:

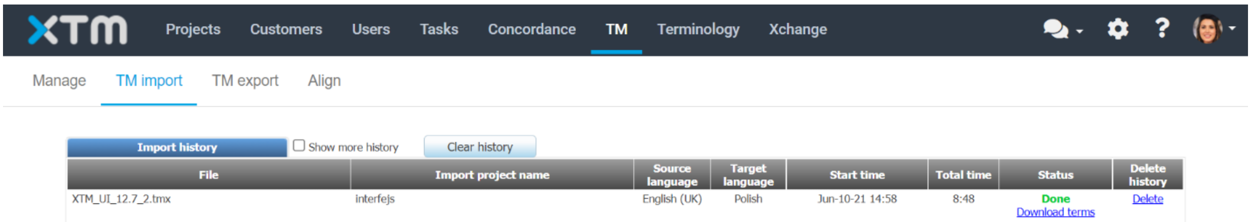
- XLF
- TMX

Extract bilingual terminology checkbox is deselected by default.

How to extract terminology from a bilingual file in the TM Import tab

1. Go to the TM tab > TM import.
2. Choose the required Customer, project name, source, and target languages, set approved/not approved status.
3. Choose a bilingual file in one of these formats:
   - XLF
   - TMX
4. Select Extract bilingual terminology checkbox.
5. Once the extraction is complete, the status in the Import history tab changes to Done.
6. Select Download terms from the Status column in the Import history tab for an Excel file containing bilingual terminology.

Note: Depending on the file size, the extraction process length varies. Check the status column.



How to extract terminology from a bilingual file in the TM Import tab

Language pairs available in terminology extraction

Languages	Arabic	Chinese	English	French	German	Japanese	Polish	Spanish	Turkish
Afrikaans									
Arabic									
Assamese									
Bengali									
Bosnian									
Bulgarian									
Chinese									
Croatian									
Czech									
Danish									
Dutch									
English									
Estonian									
Finnish									
French									
German									
Goan Konkani									
Greek									
Gujarati									
Hebrew									
Hindi									
Hungarian									
Indonesian									
Irish									
Italian									
Japanese									
Kannada									
Kinyarwanda									
Korean									
Latvian									
Lithuanian									
Macedonian									
Maithili									
Malay									
Malayalam									
Marathi									

Languages	Arabic	Chinese	English	French	German	Japanese	Polish	Spanish	Turkish
Nepali									
Norwegian									
Persian									
Polish									
Portuguese									
Romanian									
Russian									
Serbian									
Sindhi									
Slovak									
Slovenian									
Spanish									
Swedish									
Tagalog									
Tamil									
Telugu									
Thai									
Turkish									
Ukrainian									
Urdu									
Vietnamese									

Language pairs supported by Systran Neural Fuzzy Augmented

Languages	Arabic	English	French	German	Turkish
Arabic					
German					
English					
French					
Turkish					

9. XTM Xchange

XTM Xchange is a module of XTM that brings together translators with organizations that have translation requirements. It is composed of two sections:

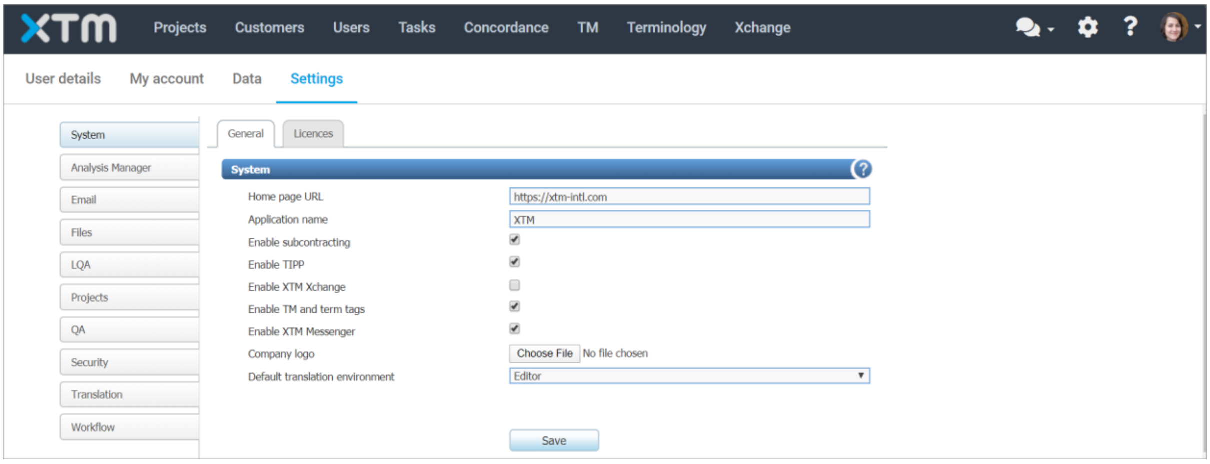
1) A directory of freelancer translators and companies
2) A marketplace where project managers looking for translation resources can publish jobs and registered users can quote to do the work. The project manager can then review the quotes, select the most appropriate candidate and either import their details into their own database of users or allocate the work to them as subcontractors.

Registering with XTM Xchange

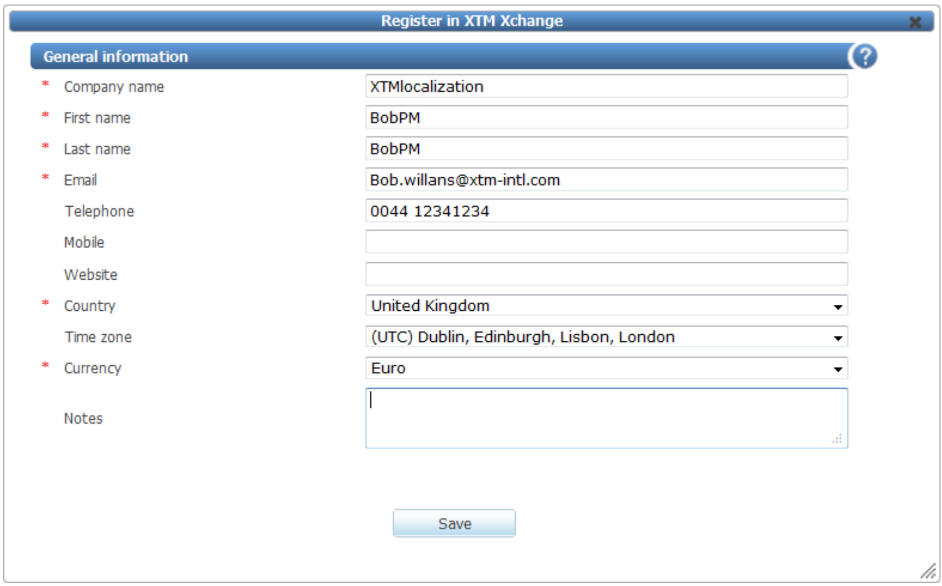
Existing XTM users

If you already have an XTM account, follow these steps to activate XTM Xchange and Register your details:

1) Go to Configuration > Settings and check the “Enable XTM Xchange” check box.
2) Click Save.
3) The Xchange tab will appear at the top and a register button will appear.
4) Click the Register button.
5) All your details will be defaulted into the General Information fields. Add any missing data
6) Click Save.

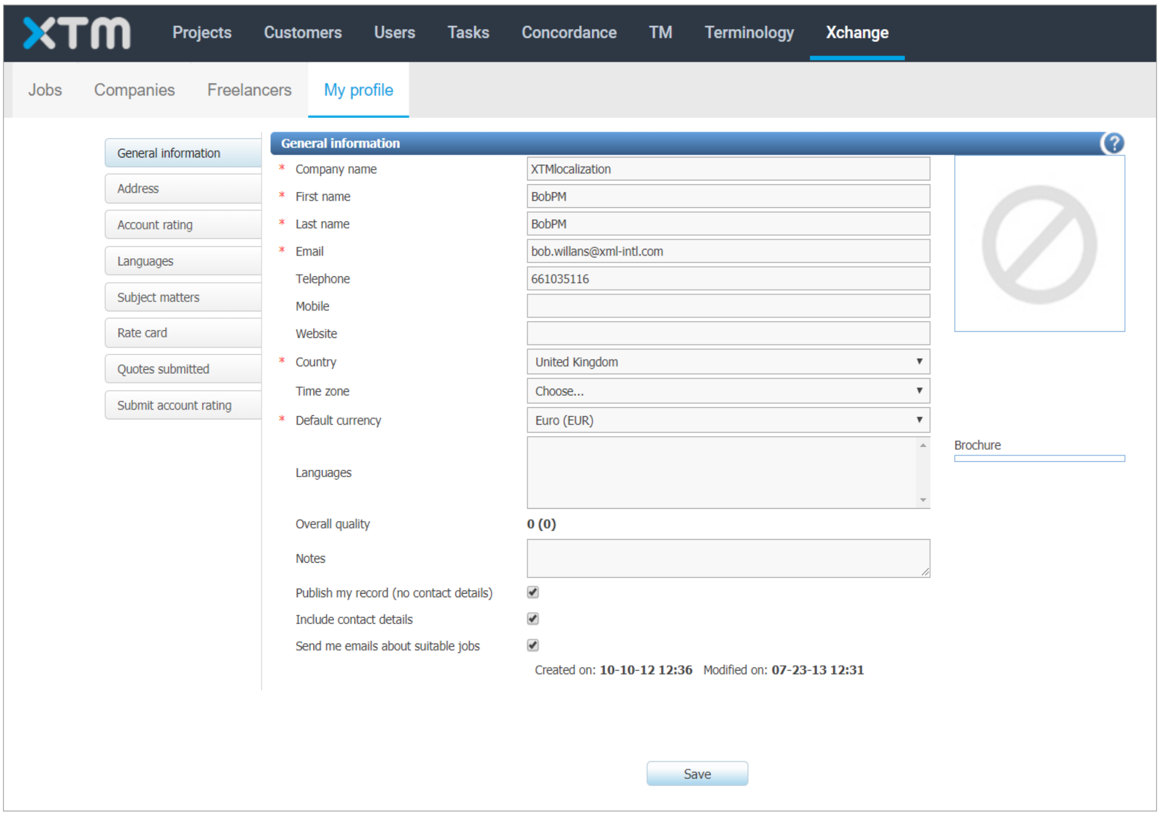


Activating XTM Xchange



Activating XTM Xchange

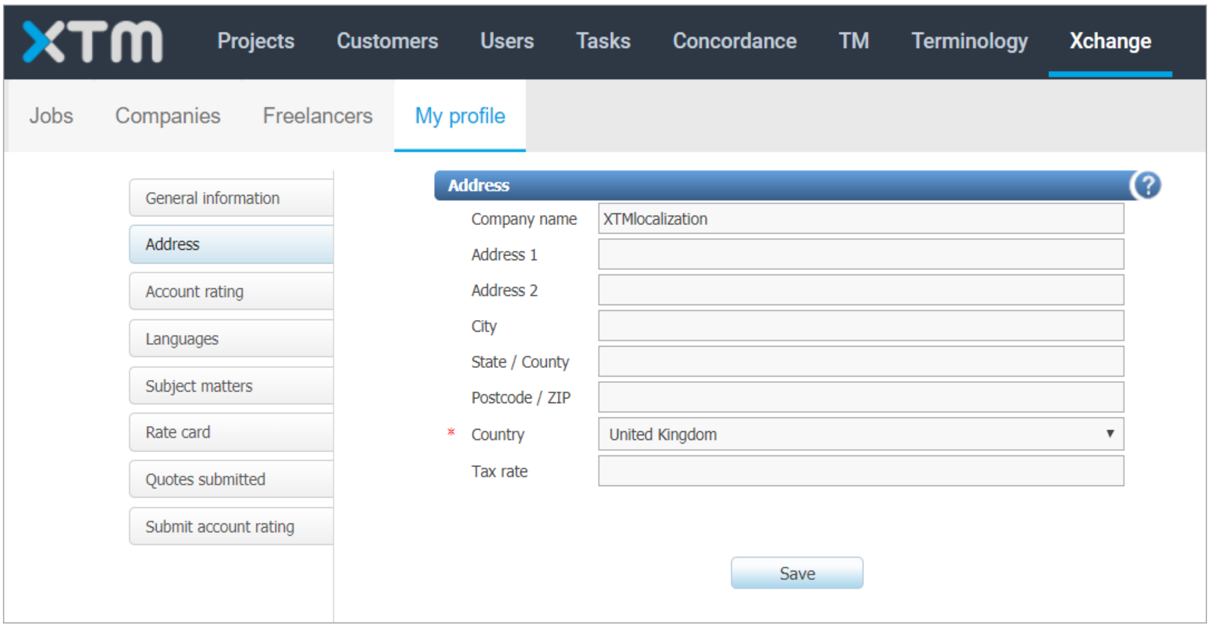
When you have saved your initial data, you are then able to enter more information about you as a person or a company.



XTM Xchange My profile General information

If you wish to publish your record in XTM Change check the “Publish my record (no contact details)” box, then if you wish your contact information to be published check the “Include contact details” box

Next enter the information on the following tabs: Address, Languages, Subject matters, & Rate card

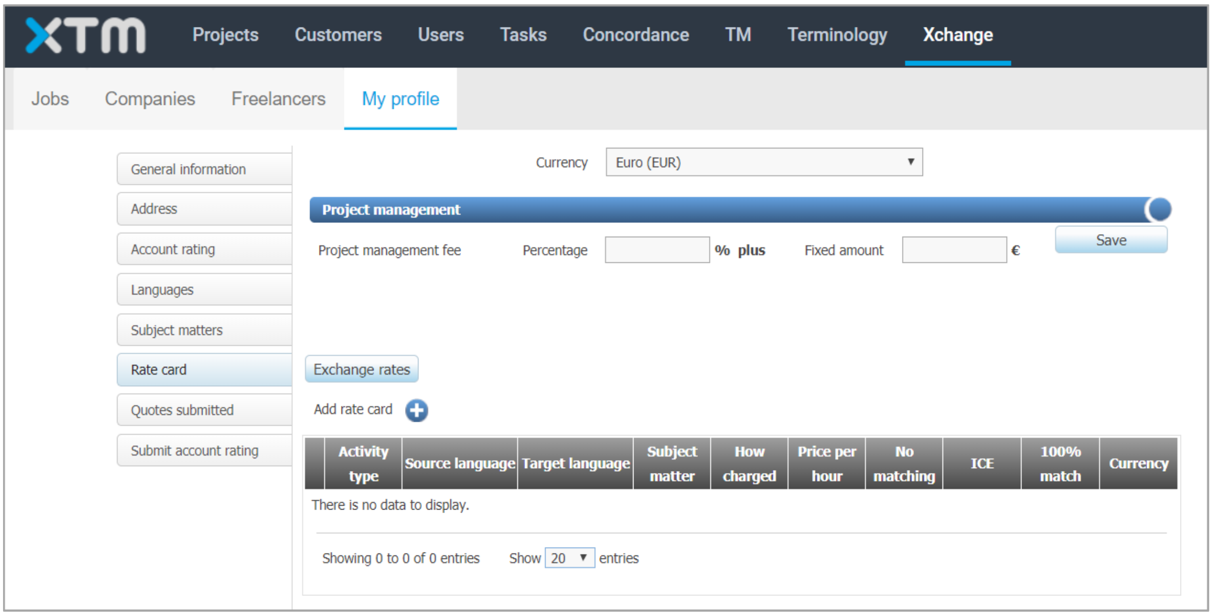


XTM Xchange My profile Address

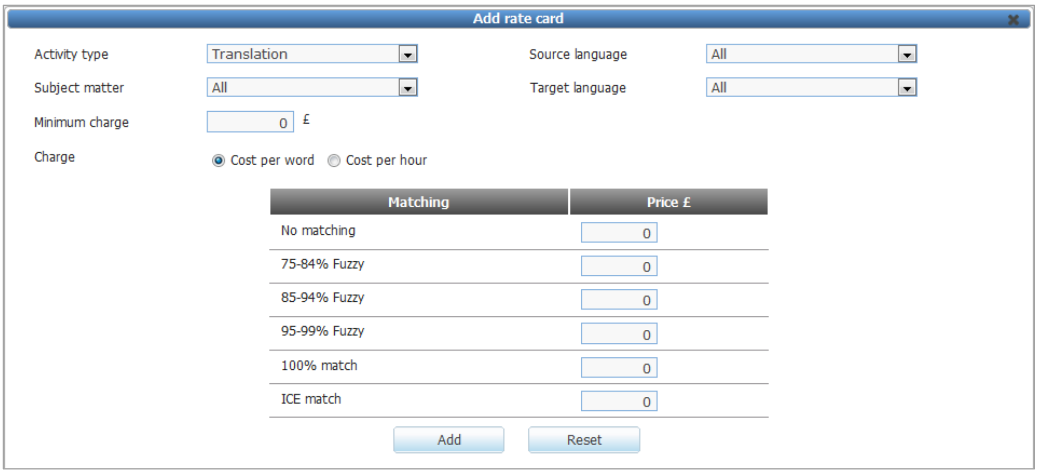
You can create multiple rate cards in XTM for each combination of the following elements:

- Activity type
- Language combination
- Subject matter

The rate card currency defaults from the value on the general information tab, but you can set it manually to create a rate card in any currency. Alternatively, you can enter exchange rates so that when you have to quote in another currency the rate card will be automatically converted.



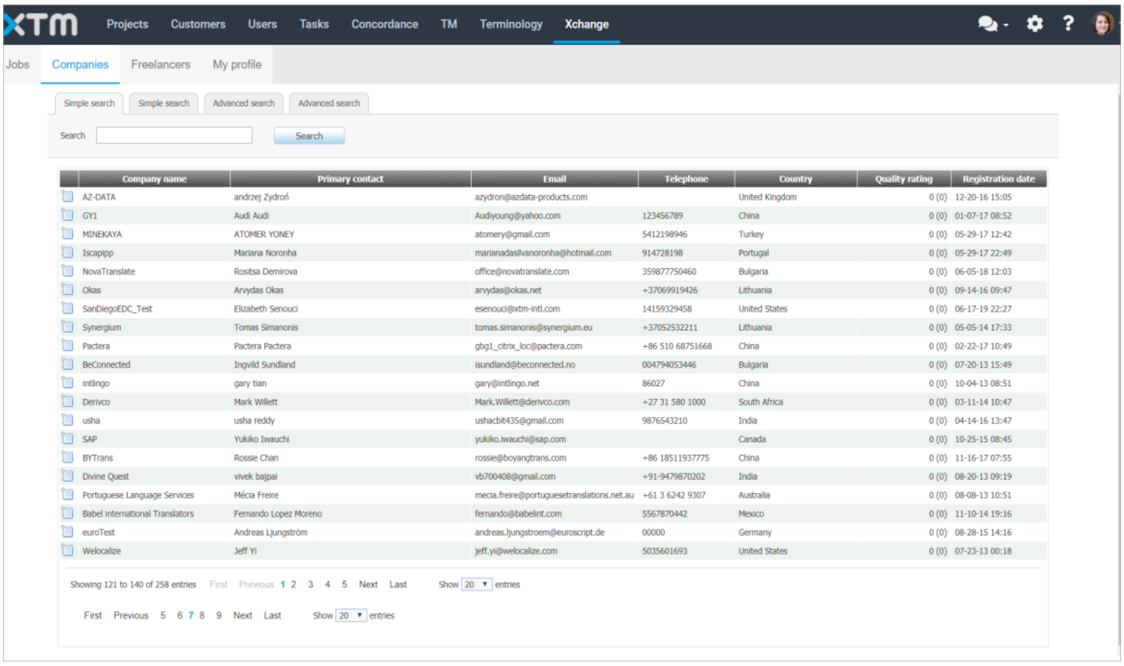
XTM Xchange My profile Rate cards



Adding a new rate card

The directory of companies

Clicking on the Companies tab lists all the companies that have registered with XTM Xchange. If a company has chosen not to publish their details, or you are a demo user of XTM, then key parts of their information are replaced by stars ***

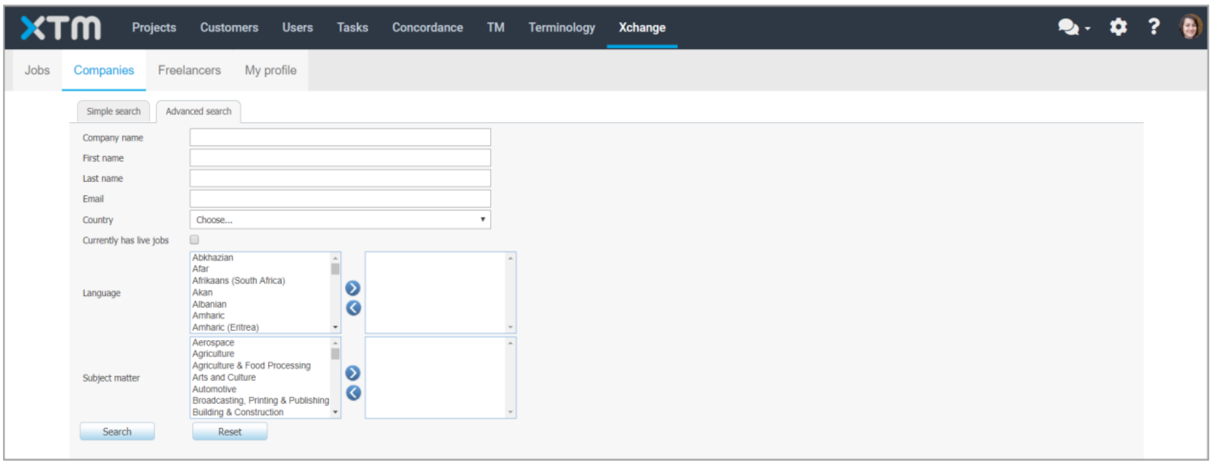


XTM Xchange Company listing

Double click on a line to view the details of each company.

To find specific company you can either use the quick search field which searches on

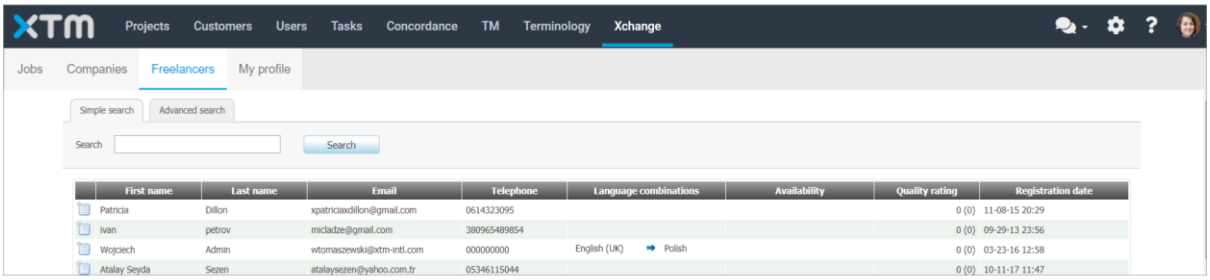
Or select the Advanced search tab which also allows you to specify language or subject matter.



XTM Xchange Company Advanced search

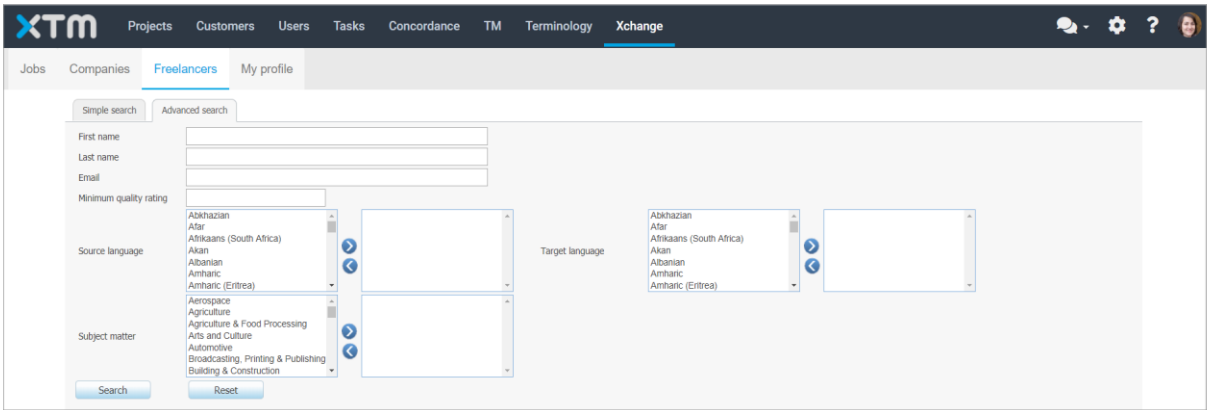
The directory of freelancers

Clicking on the Freelancers tab lists all the freelancers that have registered with XTM Xchange. Again if a freelancer has chosen not to publish their details, or you are a demo user of XTM, then key parts of their information are replaced by stars ***



XTM Xchange Freelancer listing

Double click on a line to view the details of each freelancer.

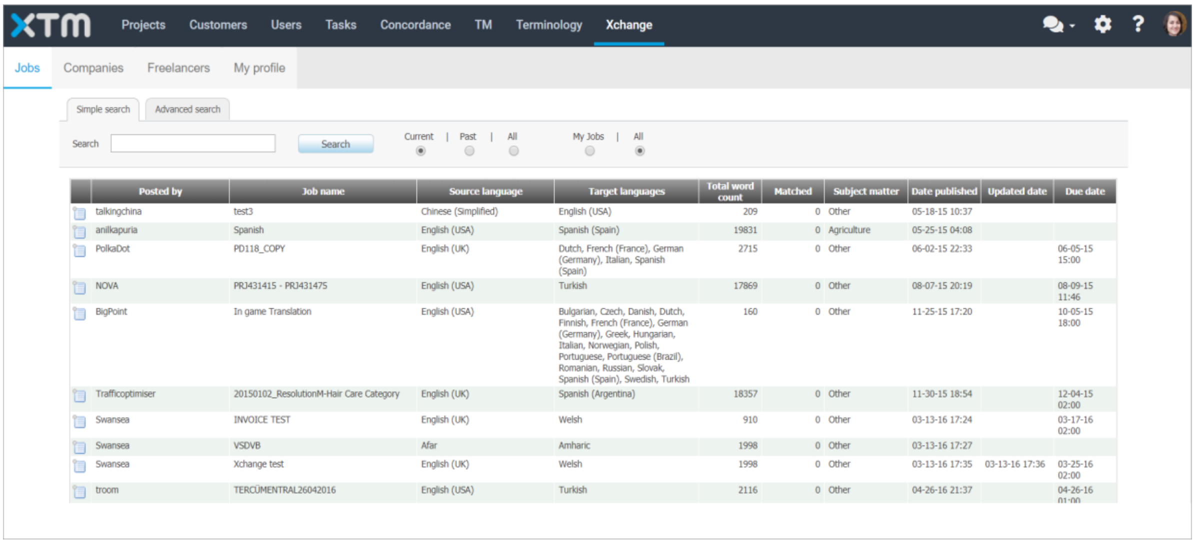


XTM Xchange Freelancer Advanced search

The list of Jobs

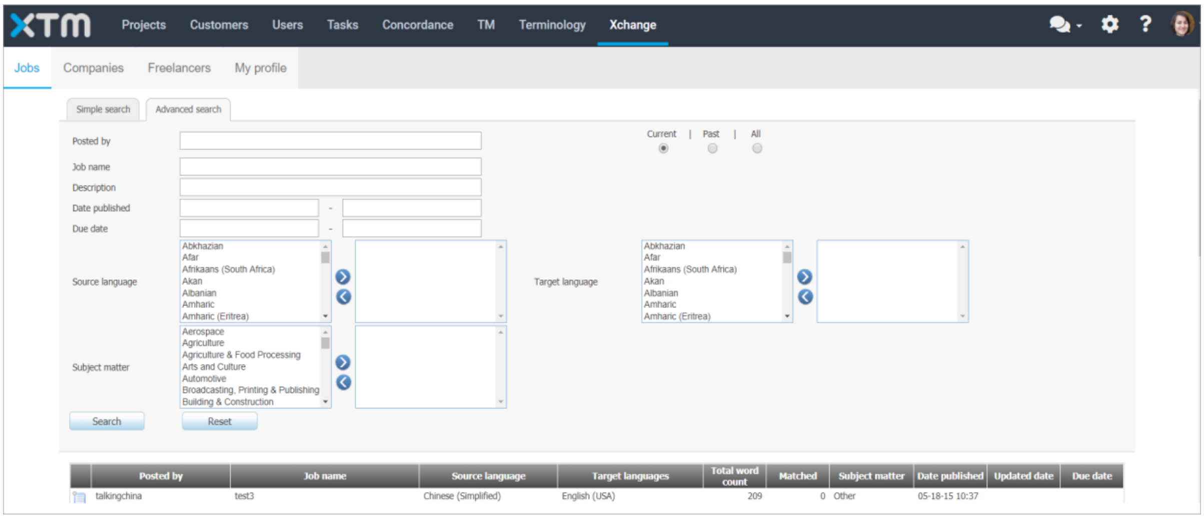
Clicking on the jobs tab displays the full list of jobs. You can filter the jobs by using the search field at the top or using the radio buttons to view:

- Current, all or past jobs
- Your jobs or all jobs



XTM Xchange Job listing

The advanced search tab allows you to carry out a very detailed search for jobs

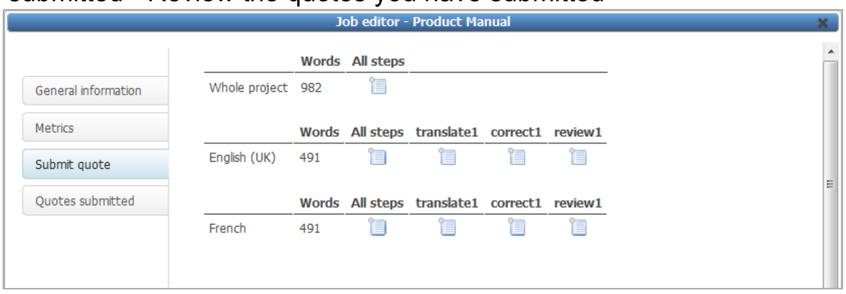


XTM Xchange Jobs Advanced search

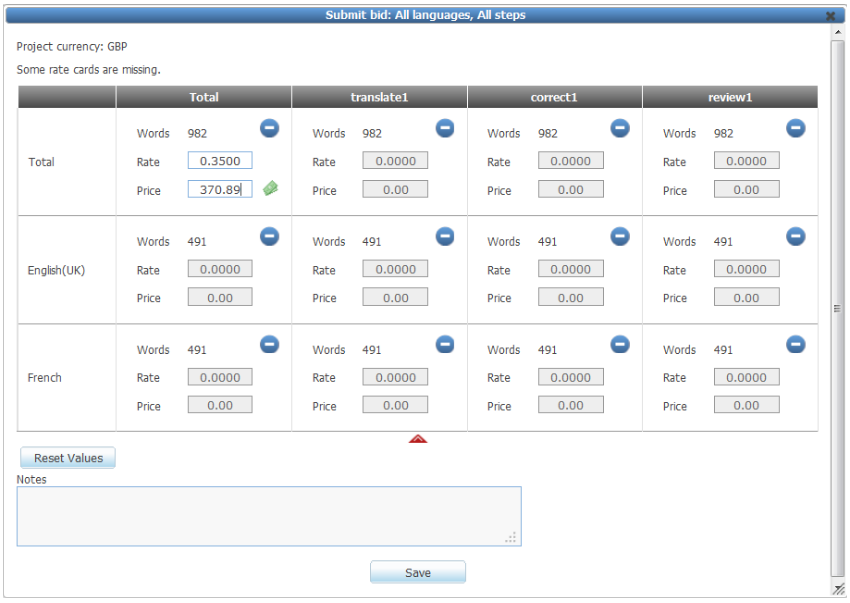
Submitting a quote for a job

Once you have found your job double click it to view the details. There are 4 tabs:

- General Information – View the subject matter required languages and project dates.
- Metrics – View the word count, TM matches and repetitions
- Submit quote – Enter a quote for either the whole job or whole target language or a step for a target language.
- Quotes submitted - Review the quotes you have submitted



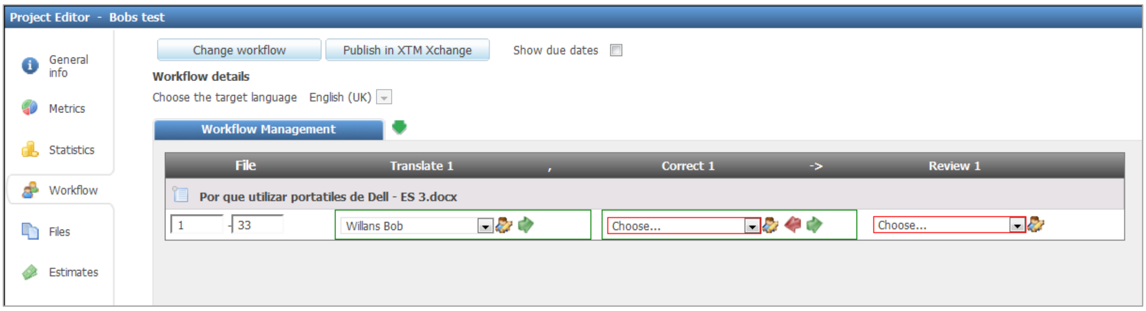
Selecting the appropriate language or step for entering a quote



Entering a quote for a job.

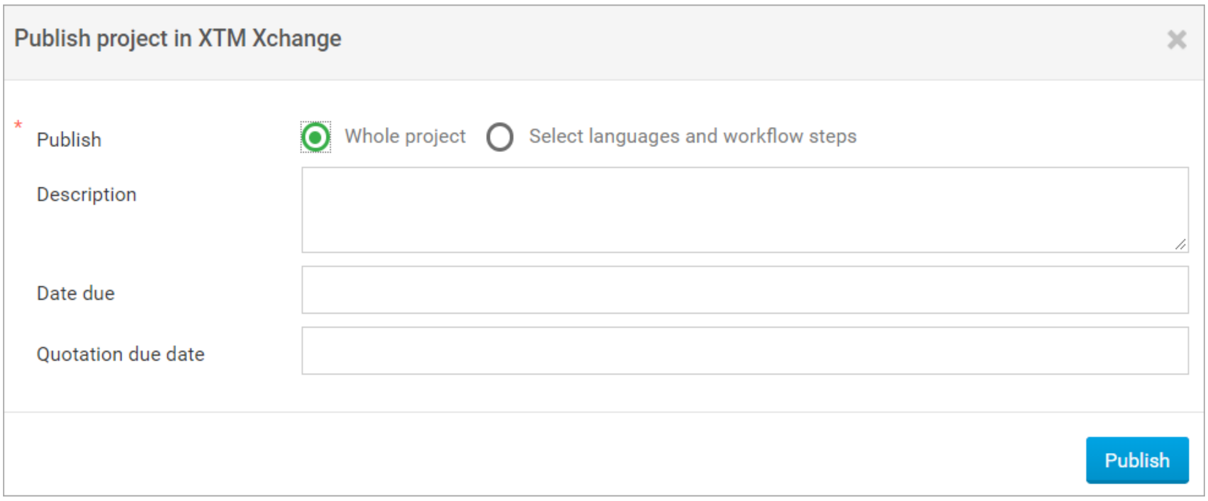
Publishing a job

To publish a job in XTM Xchange click the “Publish in XTM Xchange” button on the Workflow tab.



Project editor, workflow tab showing the publish to XTM Xchange button

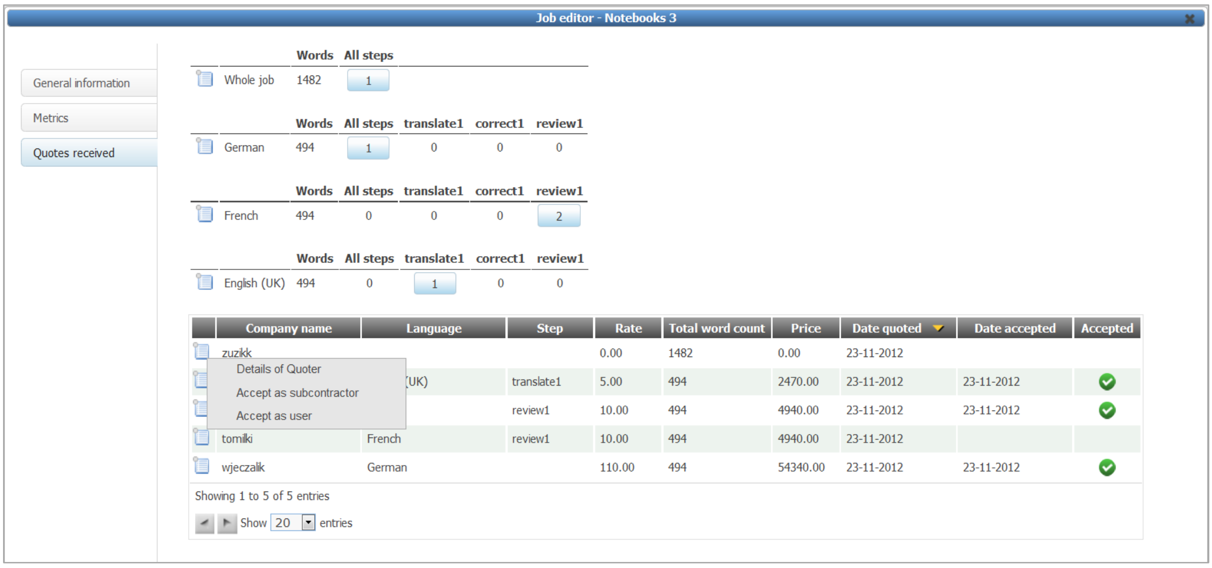
A window appears where you can set a number of options. First, you can choose to publish the project as a whole or you can choose to publish selected languages or steps in the workflow. You can then add some descriptive text, set the job due date and the quotation due date. Click the Publish button to publish the project to XTM Xchange.



Publishing a job for selected languages and workflow steps.

Reviewing the quotes received for a job

From the job listing select my jobs and view the details of the job. Select the tab “Quotes received”



Reviewing the quotes for a job

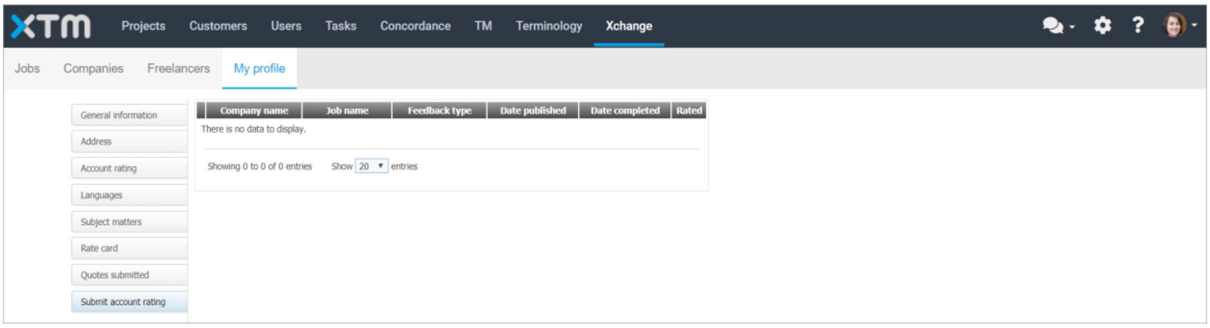
By default, all the quotes are listed in the line listing. You can filter the quotes by clicking on the buttons in the top section. The listing displays the detail of the quote and the total price.

To view the details of the quoter select the menu icon  and select the item from the menu. The information there together with the price will allow you to accept the best quote or quotes. There are two options for accepting the quote.

1) Import the details of the freelancer into your copy of XTM and then allocate the work to them in the Project editor > Workflow tab.
2) Set up the quoter as a subcontractor. In this case a connection is automatically created between your instance of XTM and theirs. They will be automatically allocated to the tasks in the workflow.

Submitting an account rating

You can rate the all the people and companies that you have worked with either as a publisher or as a quoter. The "Submit account rating" on the My profile tab lists all your interactions with XTM Xchange members. Any interactions that you have already rated are marked with a green tick icon .



Reviewing ratings that have been submitted or awaiting submission

To enter a new rating, double-click online and the rating window pops up. Basic information about the job is given at the top and clicking on the job details icon gives you information about the job metrics and quote.

You can either set the value for individual attributes by clicking on the number of stars and then XTM will calculate the overall rating for you, or you can just enter the overall rating.

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10. XTM Support Portal

The purpose of the XTM Support Portal is to facilitate communication between XTM users and XTM Support Team. The Portal helps the XTM Support Team organize the issues reported by XTM users and keep track of the progress of handling issues.
XTM users can access the Portal at https://support.xtm-intl.com.

Creating an account in XTM Support Portal

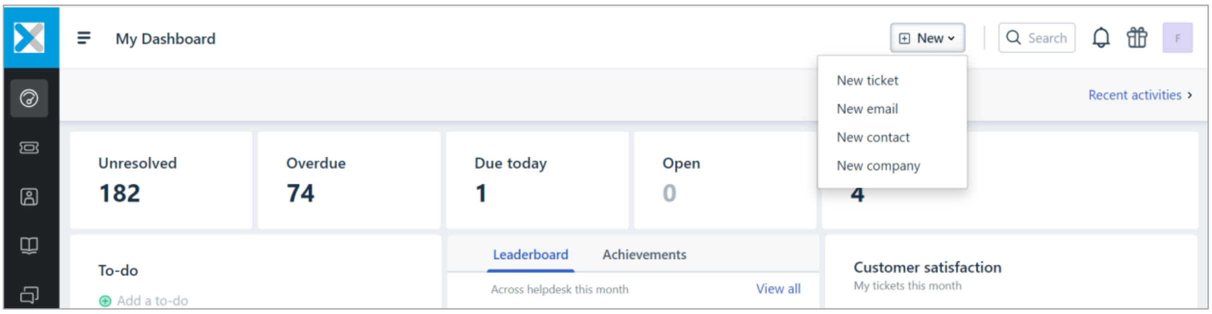
To submit tickets XTM users need to sign up and create their accounts in the Portal.

To create an account:

1. Go to support.xtm-intl.com.
2. In the top navigation bar click “Sign up”.
3. Fill in the form (use your company e-mail address) and click “Register”.
4. A confirmation e-mail will be sent to you with an activation link. Click the link and set the password.

Creating a ticket in the XTM Support Portal

1. Go to https://support.xtm-intl.com, enter your credentials, and click Login.
2. You may be taken to the Freshworks page where you will be prompted to provide the same credentials again. Click Sign in.
3. Once you are logged in, on the navigation bar click “New” and then “New ticket” to open a New ticket pop-up window.
4. Enter all the details.
5. Once the “Submit” button is clicked the ticket is created and you’ll receive a confirmation e-mail.



Creating a new ticket

Ticket management

By default, when you’ve logged in, you can view all your tickets under the Tickets button. Note, however, that it is possible to view all the tickets created in your company (i.e. created by all XTM users of your company domain). Contact XTM Support Team to provide additional configuration.

The list of all tickets can be filtered by using several filtering options:

- All Tickets
- Open or Pending
- Resolved or Closed

Next, decide about the order in which tickets are displayed:

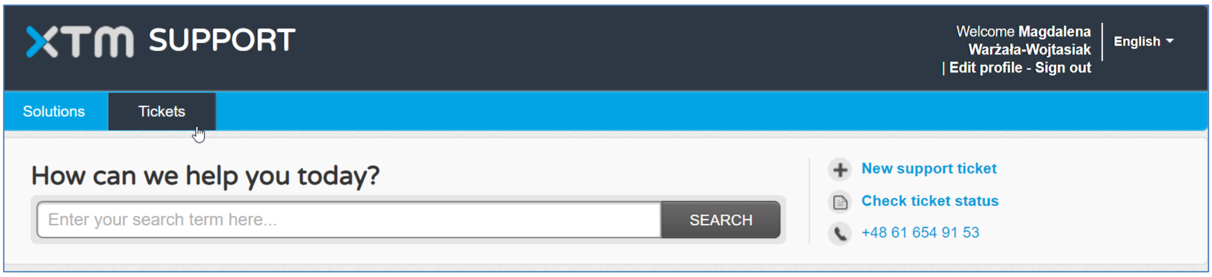
- Date Created
- Last Modified
- Status

You may choose to view the tickets in an ascending or descending order.

The most important elements of tickets are:

- An Agent who is handling the ticket
- Ticket details with metadata
- Ticket priority (Low, Medium, High, Urgent) set by the Customer
- A reply field which is used to reply to the ticket
- Ticket ID and its title

Tickets can be accessed by clicking the dropdown menu.



“Tickets” button

11. XTM Offline Editor

Introduction

The XTM Offline Editor is a self-contained Microsoft Excel application. It allows you to translate, correct and review off-line. The only software that you need to install to use it is a compatible version of Microsoft Excel.

The XTM Offline Editor works in a similar manner to the online, browser-based version of XTM Workbench. If you have used XTM Workbench, then you will be familiar with the main principles of the XTM Offline Editor. Comments appear as Excel comments, to the right of the target segment column.

Minimum software requirements

The following software configuration is required to run the XTM Offline Editor:

1. Microsoft Windows XP or later
2. Microsoft Excel 2007, 2010 or 2013 32-bit edition

The application will run with 64-bit editions of Excel, but with some limitations. We recommend that you install the 32-bit edition.

The application runs with MS Office 2011 for the Mac.

Minimum hardware requirements

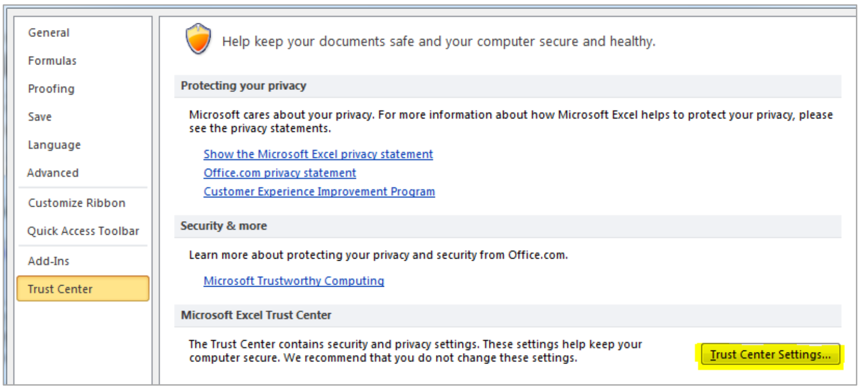
Windows PC with a minimum of 512Mb RAM and a Pentium 4 processor or above, Core 2 duo or better preferred.

XTM Offline Editor Configuration

Enabling Macros

Make sure that you have enabled macros in Excel:

1. Select File > Options > Trust Center.
2. Select the 'Trust Center Settings…' button on the right side



3. Select Macro Settings and ensure that 'Disable all macros except digitally signed macros' is selected.

Starting the XTM Offline Editor

On opening the XTM Offline Editor file using Excel you must enable editing and enable content.

The exact format of the messages will vary depending on the version of Excel being used.

Icon bar

The floating icon bar provides quick access to key functions:

Icon	Function
	Spell check all target language segments
	Go to previous incomplete segment
	Go to next incomplete segment
	Add a comment (this function is also available from the right button click menu list)
	Go to previous segment with comments
	Go to next segment with comments
	Go to next segment with errors
	Invoke the Find and Replace dialog box
	Invoke the Setup dialog box to switch on or off auto spell checking of target segments and to show all terminology and matching comments
	Show this help

The Go To field

The 'Go To' field at in the header section allows you to go straight to the selected segment ID.

Keyboard shortcuts in XTM Offline Editor

The XTM Offline Editor keyboard shortcuts are different from the online XTM Workbench.

Keystroke	**Function**
Tab	Saves the current segment and moves to the next segment.
Shitf+Tab	Moves to the previous segment.
Return	Saves the current segment moves to the next segment and copies the first match, if any, to the target field of the next segment.
Escape	Undoes any editing in the current segment and moves to the next segment
F1	Open this Help document
Control+x	Cut
Control+c	Copy
Control+v	Paste

Control+f	Opens the Find and Replace dialog window
Control+g	Opens the Go To Segment dialog window
Control+m	Add a translation comment to this segment
Control+o	Concordance
Control+p	Print
Control+t	Copies the source text to the target segment.
Control+End	Go to the last segment
Control+Home	Go to the first segment
Control+Up arrow	Go to the previous incomplete segment
Control+Down arrow	Go to the next incomplete segment
Control+,	Go to the previous segment with a translation comment
Control+.	Go to the next segment with a translation comment
Control+\	Concordance
Control+e	Go to the next segment with errors
Control+0…9	Inserts the appropriate inline element e.g. Control+1 = **{1}**, Control+0 = **{10}** etc
Control+Space	Inserts a hard space character, e.g. {sp}

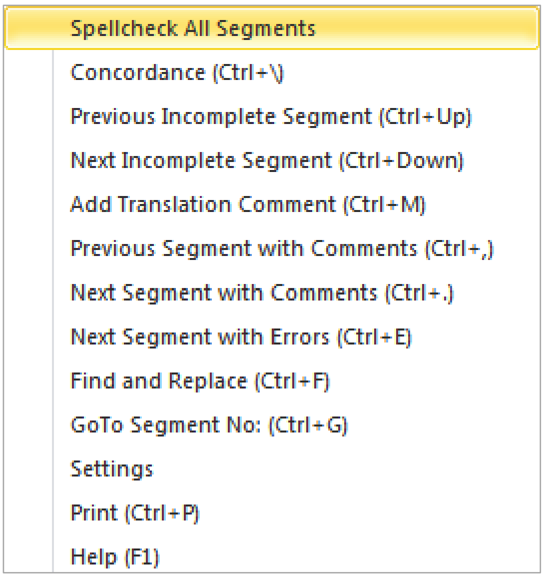
Using the mouse

Clicking the mouse on the following areas has the following effect:

Clicking on	**Function**
Target segment	Opens the segment to reveal any inline element details, terminology and matching. Places the cursor in the target segment text and selects the whole of the text. Use the Tab or Return keys to move to the next segment.
Source segment	Copies the source text to the target segment
Any term	Replaces the source term with the target term within the target segment.
Any match	Copies the match to the target segment

Using the mouse right button click

Clicking the mouse right button while editing a segment has no effect. Clicking the mouse right button outside of the target cell will bring up the following menu:



These menu items are the same as for the icon bar with the addition of the ‘GoTo Segment No:’, Concordance and Print options.

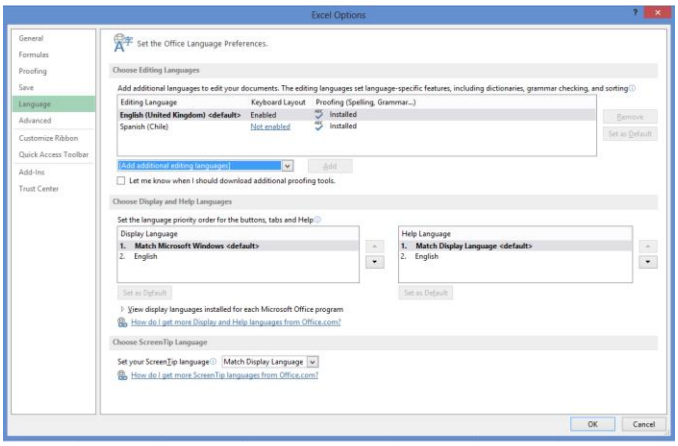
Printing

To print the page, use the Control+P keyboard shortcut to bring up the standard print dialogue box. XTM Offline Editor will automatically set the Print range to All and Print what to Selection. You can choose the printer and set the number of copies.

Spell Checking

The spellchecking uses the built-in Microsoft spell checker. To spell check all the target segments click the  icon.

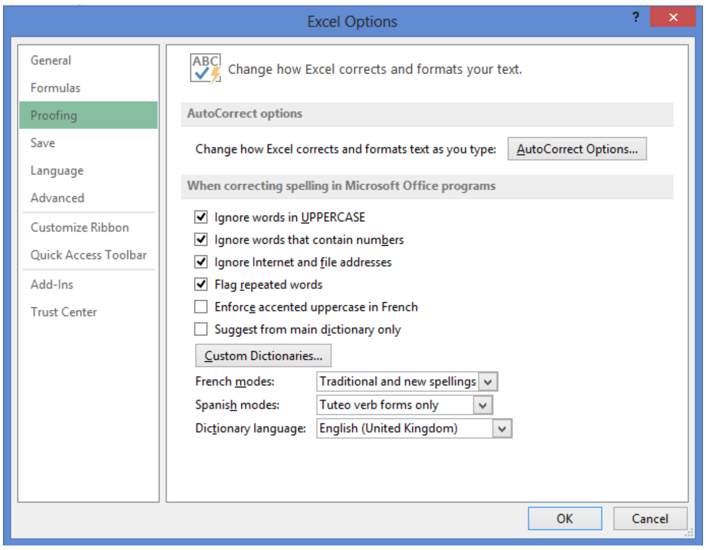
Before running a spell check ensure that the project target language is set as the default editing language. To do this within Excel go to File-> Options->Language:



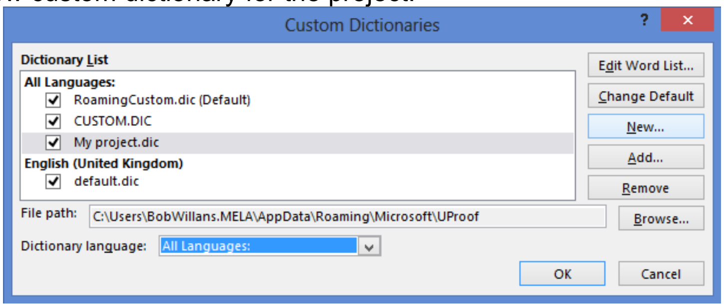
When spell checking the whole project, the ‘Ignore All’ option only applies to the current segment. If you wish to ignore specific words for the whole of file then add them to a custom dictionary.

To do this select Options in the spelling box:

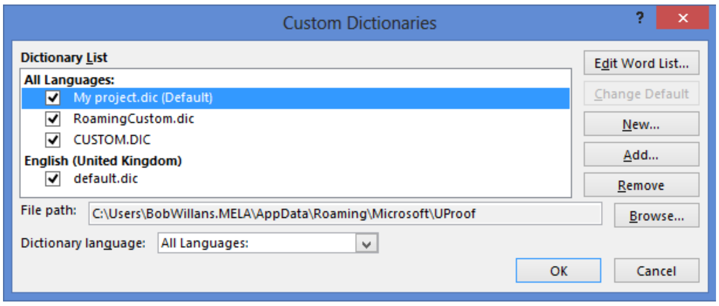
And then select Custom Dictionaries:



And create a new custom dictionary for the project:



Finally make it the default custom dictionary:



12. Appendix 1: Glossary

API (application programming interface)
A software interface that enables applications to communicate with each other. An API is the set of programming language constructs or statements that can be coded in an application program to obtain the specific functions and services provided by an underlying operating system or service program.

Bidirectional (writing system)
A writing system in which text is generally flush right, and most characters are written from right to left, but some text is written left-to-right as well. Arabic and Hebrew are the only bidirectional writing systems in current use.

Bundle
A project manager may divide the text segments of a job into sections which are called bundles. Bundles can be allocated to different linguists.

Computer aided translation (CAT
Computer technology applications that assist in the act of translating text from one language to another.

Concordance
An alphabetical index of a word or phrase in the source text showing every contextual occurrence of the word or phrase in the text and in the available TM.

Content management system (CMS)
A system used to store and subsequently find and retrieve large amounts of data. CMSs were not originally designed to synchronize translation and localization of content, so most have been partnered with globalization management systems (GMS).

DITA (Darwin Information Typing Architecture)
An XML-based architecture for authoring, producing, and delivering technical information. This architecture consists of a set of design principles for creating “information typed” modules at a topic level and for using that content in delivery modes such as online help and product support portals on the web.

File filter templates
Filter templates can be used to specify configuration for identifying translatable text in a document. Administrators can create templates which can then be used by Project managers to greatly improve productivity.

Fuzzy match
Refers to the situation when a sentence or phrase in a translation memory (TM) is similar (but not a 100% match) to the sentence or phrase the translator is currently working on. The TM tool calculates the degree of similarity or “fuzziness” as a percentage figure.

Globalization management system (GMS) /Translation Management System (TMS)
Focuses on managing the translation and localization cycles and synchronizing those with source content management. Provides the capability of centralizing linguistic assets in the form of translation databases, leveraging glossaries and branding standards across global content.

GMX-V (Global information management Metrics eXchange – Volume)
A word and character count standard for electronic documents. GMX-V is developed and maintained by OSCAR (Open Standards for Container/Content Allowing Re-use), a special interest group of LISA (Localization Industry Standards Association). GMX-V, one of the tripartite series of standards from LISA, deals with electronic document metrics. GMX is made up of the following standards: GMX-V — Volume; GMX-C — Complexity; and GMX-Q — Quality.

In-context exact match (ICE match)
Refers to the situation when a sentence or phrase in a translation memory (TM) is the same phrase in the same context as the sentence or phrase the translator is currently working on.

Internationalization (i18n)
The process of generalizing a product so that it can handle multiple languages and cultural conventions without the need for redesign. In i18n, the common abbreviation for *internationalization*, the *18* refers to the eighteen letters between the *i* and the *n*.

Internationalization Tag Set (ITS)
A technology to easily create XML which is internationalized and can be localized effectively.

Job
In the XTM Workflow the processing of one file from the source language to one target language.

Leveraged match
A leveraged match is when a sentence or phrase in a translation memory (TM) is the same phrase in a different context as the sentence or phrase the translator is currently working on.

Localization (l10n)
In this context, the process of adapting a product or software to a specific international language or culture so that it seems natural to that particular region. True localization considers language, culture, customs and the characteristics of the target locale. It frequently involves changes to the software's writing system and may change keyboard use and fonts as well as date, time and monetary formats. In l10n, the common abbreviation for *localization*, the *10* refers to the ten letters between the *l* and the *n*.

LQA (Language Quality Assurance)
The process of evaluating the quality of translation by a human linguist. The feature in XTM is a translation quality scoring system based on the Multidimensional Quality Metrics (MQM) model which has been designed as part of the QT Launchpad project. There is a dedicated LQA step.

Machine translation (MT)
A technology that translates text from one human language to another, using terminology glossaries and advanced grammatical, syntactic and semantic analysis techniques.

Metrics
A measure of the number of segments, words and characters in the source document, together with a summary of the different types of matching that are present after the translation memory has been applied. It also includes matching from within the document or repetitions.

Open Architecture for XML Authoring and Localization (OAXAL)
A reference model of how to construct an effective and efficient system for XML authoring and Localization based on Open Standards.

Project
In XTM: translating one or more files from one source language to one or more target.

Quality assurance (QA)
All planned or systematic actions necessary to provide adequate confidence that a product or service will satisfy given requirements for quality. QA covers all activities from design, development, production and installation to servicing and documentation.

Right-to-left languages
Languages such as Hebrew, Arabic, Urdu and Farsi are written primarily right-to-left. This text flow presents significant text and graphic layout implications.

Software as a service (**SaaS**)
is software that is deployed over the internet. With SaaS, a provider licenses an application to customers as a service on demand, through a subscription, in a "pay-as-you-go" mode. The SaaS version of XTM is called XTM Cloud.

Segment
A unit of text that the CAT tool creates in order to match against the translation memory. The unit may be a single word, a phrase, one or more sentences, or even a larger unit.

Segmentation Rules eXchange (SRX)
The vendor-neutral standard for describing how translation and other language processing tools segment text for processing. It allows translation memory and other linguistic tools to describe the language-specific processes by which text is broken into segments (usually sentences or paragraphs) for further processing.

Source language
The language of a text which is to be translated into another language

Step
The workflow in XTM is composed of steps; the available default steps are: translate, correct and review.

Target language
The language into which a text written in another language is to be translated

Task
In XTM processing, a bundle of segments in one step is a task.

Terminology management
Primarily concerned with manipulating terminological resources for specific purposes — for example, establishing repositories of terminological resources for publishing dictionaries, maintaining terminology databases, *ad hoc* problem solving in finding multilingual equivalences in translation work or creating new terms in technical writing. Terminology management software provides the translator a means of automatically searching a given terminology database for terms appearing in a document, either by automatically displaying terms in the translation memory software interface window or through the use of hotkeys to view the entry in the terminology database.

Terminology manager
A computer technology application tool that assists in the translation of text from one spoken language to another.

Translation memory (TM)
A special database that stores previously translated sentences which can then be reused, in full or in part, on a sentence-by sentence basis. The database matches source to target language pairs.

Translation Memory eXchange (TMX)
An open standard, based on XML, which has been designed for exchanging translation memories (TMs) between CAT tools.

Unicode
The Unicode Worldwide Character Standard (Unicode) is a character encoding standard used to represent text for computer processing. Originally designed to support 65,000 characters, it now has encoding forms to support more than 1,000,000 characters.

UNIX
A multiuser, multitasking operating system. It was one of the first operating systems to be written in a high-level programming language, thus making it hardware independent.

UTF-8 (Unicode transfer format)
An encoding form of Unicode that supports ASCII for backward compatibility and covers the characters for most languages in the world.

Web service
A collection of protocols and standards used for exchanging data between applications or systems.

XLIFF (XML Localization Interchange File Format)
An XML-based format for exchanging localization data. Standardized by OASIS and aimed at the localization industry, XLIFF specifies elements and attributes to aid in localization. XLIFF could be used to exchange data between companies, such as a software publisher and a localization vendor, or between localization tools, such as translation memory systems and machine translation systems.

XML (eXtensible Markup Language)
Extensible Markup Language (XML) is a simple, flexible text format originally designed to meet the challenges of large-scale electronic publishing.

xml:tm
XML-based text memory, a LISA OSCAR standard for author and translation memory.

13. Appendix 2: Language codes

XTM is UTF-8 based and so supports all languages. The following is a list of languages and their codes that are currently available in XTM. If you require other languages, please contact support@xtm.cloud

CODE	LANGUAGE
ab	Abkhazian
aa_ET	Afar
ach	Acholi
ak	Akan
af_ZA	Afrikaans (South Africa)
sq_AL	Albanian
am_ET	Amharic
am_ER	Amharic (Eritrea)
anu	Anuak
ar_AA	Arabic
ar_AE	Arabic (United Arab Emirates)
ar_BH	Arabic (Bahrain)
ar_DZ	Arabic (Algeria)
ar_EG	Arabic (Egypt)
ar_EH	Arabic (Western Sahara)
ar_IQ	Arabic (Iraq)
ar_JO	Arabic (Jordan)
ar_KW	Arabic (Kuwait)
ar_LB	Arabic (Lebanon)
ar_LY	Arabic (Libya)
ar_MA	Arabic (Morocco)
ar_MR	Arabic (Mauritania)
ar_OM	Arabic (Oman)
ar_PS	Arabic (Palestinian Territory)
ar_QA	Arabic (Qatar)
ar_SA	Arabic (Saudi Arabia)
ar_SD	Arabic (Sudan)
ar_SY	Arabic (Syria)
ar_TD	Arabic (Chad)
ar_TN	Arabic (Tunisia)
ar_YE	Arabic (Yemen)
hy_AM	Armenian
hy_AM_arevela	Eastern Armenian
hy_AM_arevmda	Western Armenian
as_IN	Assamese
aii	Assyrian Neo-Aramaic
ast_ES	Asturian (Spain)
ay_BO	Aymara
az_AZ_Cyrl	Azeri (Cyrillic - Azerbaijan)
az_AZ_Latn	Azeri (Latin - Azerbaijan)
ba_RU	Bashkir
bam	Bambara
bbc	Batak Toba
bfa	Bari
eu_ES	Basque
bsq	Bassa
bbc	Batak Toba
bem	Bemba
bn_IN	Bengali
bn_BD	Bengali (Bangladesh)
bal_IR	Bhutani
bh_IN	Bihari
bi_VU	Bislama
bs_BA_Cyrl	Bosnian (Cyrillic)
bs_BA_Latn	Bosnian (Latin)
br_FR	Breton
bg_BG	Bulgarian
bsk	Burushaski

my_MM	Burmese
be_BY	Byelorussian
cal	Carolinian
ca_ES	Catalan (Spain)
ceb	Cebuano (used in Philippines)
cha	Chamorro
cjm	Cham (Eastern)
cja	Cham (Western)
ts_ZA_changana	Changana
ctd	Chin Tedim
cld	Chaldean Neo-Aramaic
chr	Cherokee
clt	Lautu Chin
ny_MW	Chichewa (Malawi)
zh_YUE	Chinese (Cantonese)
zh_CN	Chinese, Simplified
zh_TW	Chinese, Traditional
zh_HK	Chinese, Hong Kong
zh_SG	Chinese (Singapore)
zh_HK_Hans	Chinese (Simplified Hong Kong)
cmn	Chinese (Mandarin Traditional)
goyu	Chinese (Mandarin Traditional Taiwan)
chk	Chuukese
cpe	Creoles and pidgins (English based)
cpf	Creoles (French based)
co_FR	Corsican
hr_HR	Croatian
hr_BA	Croatian (Bosnia and Herzegovina)
cs_CZ	Czech
cmn	Catalan
dnj	Dan
da_DK	Danish
prs_AF	Dari
luo	Dholuo
din	Dinka
dv_IN	Divehi
mis	Dothraki
nl_NL	Dutch (Netherland)
Nl_BE	Dutch (Belgium)
en_US	English (US)
en_GB	English (UK)
en_142	English (Asia)
en_CA	English (Canada)
en_AU	English (Australia)
en_CN	English (China)
en_NZ	English (New Zealand)
en_ZA	English (South Africa)
en_CH	English (Switzerland)
en_HK	English (Hong Kong)
en_IN	English (India)
en_IE	English (Ireland)
en_IL	English (Israel)
en_SG	English (Singapore)
en_AE	English (United Arab Emirates)
en_DE	English (Germany)

en_NL	English (Holland)
en_AT	English (Austria)
en_NT	English (Neutral)
en_CY	English (Cyprus)
en_KE	English (Kenya)
en_BS	English (Bahamas)
en_MY	English (Malaysia)
en_PK	English (Pakistan)
en_PH	English (Philippines)
en_LU	English (Luxembourg)
en_NG	English (Nigeria)
en_JP	English (Japan)
en_TT	English (Trinidadian)
en_EU	English (Europe)
en_QA	English (Qatar)
eo	Esperanto
et_EE	Estonian
ee_GH	Ewe (Ghana)
cfm	Falam Chin
eky	Kayah (Eastern)
kyu	Kayah (Western)
fo_FO	Faroese (Faroe Islands)
fj_FJ	Fijian
fil_PH	Filipino
fi_FI	Finnish
nl_BE	Flemish
fr_FR	French (France)
fr_CA	French (Canada)
fr_CG	French (Congo)
fr_CH	French (Switzerland)
fr_BE	French (Belgium)
fr_LU	French (Luxembourg)
fr_MA	French (Morocco)
fr_SN	French (Senegal)
fr_CM	French (Cameroon)
fr_TN	French (Tunisia)
fy	Frisian
fu	Fula
fur	Friulian
fat	Fanti
gl_ES	Galician (Spain)
ka_GE	Georgian
kar	Karen
de_DE	German (Germany)
de_AT	German (Austria)
de_BE	German (Belgium)
de_CH	German (Switzerland)
de_LU	German (Luxembourg)
de_NL	German (Holland)
pdc	German (Pennsylvanian)
lb_LU	Luxembourgish
kl_GL	Greenlandic
el_GR	Greek
el_CY	Greek (Cyprus)
grc_GR	Ancient Greek
gil	Kiribati
grn	Guarani
gu_IN	Gujarati
ht_HT	Haitian Creole
cnh	Hakha Chin
ha_NG	Hausa
he_IL	Hebrew
hi_IN	Hindi
hil	Hiligaynon (Philippines)
hif	Fiji Hindi
hlt	Matu Chin
hmn	Hmong
hmn_US	Hmong (USA)

hu_HU	Hungarian
haw	Hawaiian
is_IS	Icelandic
ig	Igbo
ilo	Ilocano
id_ID	Indonesian
ia	Interlingua
ie	Interlingue
iu	Inuktitut
ium	Iu Mien
ik	Inupiak
lus	Mizo Chin
ish	Esan
ga_IE	Irish (Ireland)
it_IT	Italian
it_CH	Italian (Switzerland)
ja_JP	Japanese
jv_ID	Javanese
kgp_BR	Kaingang
ksw	Karen (Sgaw)
xsm	Kasem
ks	Kashmiri
kk_KZ	Kazakh
ogo	Khana or Ogoni proper
kg_CG	Kikongo (Kongo)
kik	Kikuyu
kig	Kimaama
rw_RW	Kinyarwanda (Rwanda)
ky	Kirghiz
rn	Kirundi
Sw_KE	Swahili (Kenya)
km_KH	Khmer
kn_IN	Kannada (India)
kok_IN	Konkani (India)
tlh	Klingon
ko_KR	Korean
kos	Kosraean
kri	Krio
kun	Kunama (Western Eritrea)
ku_TR	Kurdish (Turkey)
kmr	Kurdish (Kurmanji)
ckb	Kurdish (Sorani)
ku_IQ	Kurdish (Iraq)
lo_LA	Laothian
la	Latin
lua	Luba-Lulua
lug	Luganda
lv_LV	Latvian
ln_CG	Lingala
lt_LT	Lithuanian
mfe_MU	Morisyen (Mauritian Créole)
mk_MK	Macedonian
mg_MG	Malagasy (Madagascar)
ms_MY	Malay (Malaysia)
ms_AR	Malay (Jawi)
ms_SG,	Malay (Singapore)
ml_IN	Malayalam (India)
mt_MT	Maltese
mni	Manipuri
mi_NZ	Maori
mas	Masai
mr_IN	Marathi
mah	Marshallese
mn_MN	Mongolian
mnw	Mon
mwq	Mün Chin
mrh	Mara Chin

sla_ME	Montenegrin
mo_MD	Moldavian
nag	Nagamese
na_NR	Nauru
nv	Navajo
nd_ZW	Ndebele
ne_NP	Nepali
no_NO	Norwegian
nb_NO	Norwegian Bokmaal
niu	Niuean
nn_NO	Norwegian Nynorsk
nso_ZA	Northern Sotho (South Africa)
nus	Nuer
oc_FR	Occitan
or_IN	Oriya
om_ET	Oromo
ota	Ottoman Turkish
pag	Pangasinan
pam	Pampangan
pau	Palauan
pap	Papiamento
pis	Solomon Islands Pidgin
ps	Pashto
ps_PK	Pashto (Pakistan)
fa_IR	Persian
pon	Pohnpeian
pl_PL	Polish
pt_PT	Portuguese
pt_BR	Portuguese (Brazil)
pt_MZ	Portuguese (Mozambique)
pt_AO	Portuguese (Angola)
pa_PA	Punjabi
pa_IN	Punjabi (India)
pa_PK	Punjabi (Pakistan)
qu_PE	Quechua
qya	Quenya
xr_MM	Rohingya (Myanmar)
rar	Rarotongan
rm_CH	Rhaeto_Romance
ro_RO	Romanian
ro_MD	Romanian (Moldova)
rtm	Rotuman
ru_RU	Russian
ru_AM	Russian (Armenia)
ru_AZ	Russian (Azerbaijan)
ru_GE	Russian (Georgia)
ru_MD	Russian (Moldova)
ru_UA	Russian (Ukraine)
shn	Shan
sdh	Southern Kurdish
sm_WS	Samoan
sg	Sangro
sa_IN	Sanskrit
sc_IT	Sardinian
sco_GB	Scots (United Kingdom)
sco_IE	Scots (Ireland)
gd_GB	Scottish Gaelic (Scotland)
st	Sesotho
tn_ZA	Setswana (Africa)
sr_YU	Serbian
sr_RS_Cyrl	Serbian (Cyrillic)
sr_ME_Cyrl	Serbian – Montenegro (Cyrillic)
sr_ME_Latn	Serbian – Montenegro (Latin)
sr_RS_Latn	Serbian – Serbia (Latin)

sn	Shona
sjn	Sindarin
sd_PK	Sindhi
si_LK	Singhalese
ss	Siswati
sk_SK	Slovak
sl_SI	Slovenian
snk	Soninke
so_SO	Somali
dsb_DE	Sorbian (Lower)
hsb_DE	Sorbian (Upper)
es_ES	Spanish (Spain)
es_AR	Spanish (Argentina)
es_BO	Spanish (Bolivia)
es_CL	Spanish (Chile)
es_CO	Spanish (Colombia)
es_CR	Spanish (Costa Rica)
es_CU	Spanish (Cuba)
es_DO	Spanish (Dominican Republic)
es_EC	Spanish (Ecuador)
es_SV	Spanish (El Salvador)
es_GT	Spanish (Guatemala)
es_HN	Spanish (Honduras)
es_419	Spanish (Latin America)
es_MX	Spanish (Mexico)
es_NI	Spanish (Nicaragua)
es_PA	Spanish (Panama)
es_PY	Spanish (Paraguay)
es_PE	Spanish (Peru)
es_PR	Spanish (Puerto Rico)
es_UY	Spanish (Uruguay)
es_US	Spanish (USA)
es_VE	Spanish (Venezuela)
es_001	Spanish (International)
es_NT	Spanish (Neutral)
sez	Senthang Chin
swa	Swahili
sw_SO	Swahili (Somalia)
sw_TZ	Swahili (Tanzania)
sw_UG	Swahili (Uganda)
sv_SE	Swedish
sv_FI	Swedish (Finland)
apd_SD	Sudanese Arabic
apd_SD_Latn	Sudanese Arabic (Latin)
sun	Sundanese
syr_TR	Syriac
tl_PH,	Tagalog
tg_TJ	Tajik
ta_IN	Tamil
ta_SG	Tamil (Singapore)
ta_LK	Tamil (Sri Lanka)
tt_RU	Tatar
te_IN	Telugu
tet_ID,	Tetum (Indonesia)
tet_TL	Tetum (Timor-Leste)
th_TH	Thai
bo	Tibetan
tcz	Thado Chin
ti	Tigrinya
tir_ER	Tigrinya (Eritrea)
tir_ET	Tigrinya (Ethiopia)
to_TO	Tonga
ton	Tongan
toq	Toposa
ts_ZA	Tsonga
tn_BW	Tswana
tpi	Tok Pisin

tvl	Tuvaluan
tr_TR	Turkish
tk_TM	Turkmen
tkl	Tokelauan
tw	Twi
ty	Tahitian
uk_UA	Ukrainian
ur_IN	Urdu
ur_PK	Urdu (Pakistan)
ug_CN	Uyghur (China)
uz_UZ_Cyrl	Uzbek (Cyrillic)
uz_UZ_Latn	Uzbek (Latin)
uz_AF	Uzbek (Afghanistan)
cy_GB	Welsh
vi_VN	Vietnamese
vo	Volapk
wo	Wolof
war	Waray (Philippines)
xh_ZA	Xhosa (South Africa)
xz_AF	Hazaragi (Afghanistan)
yao	Yao
yap	Yapese
yi	Yiddish
yi_IL	Yiddish (Israel)
yi_US	Yiddish (USA)
yo_NG	Yoruba
yrl_BR	Nheengatu
czt	Zotung Chin
zom	Zou
zu_ZA	Zulu (South Africa)
zh_YUE	Chinese (Cantonese)
ziw	Zigula
zyp	Zyphe Chin

14. Appendix 3: Spelling dictionaries

The following dictionaries are included in XTM for spell checking:

af-ZA	Afrikaans (South Africa)
am-ET	Amharic
ar-AA	Arabic
be-BY	Byelorussian
bg-BG	Bulgarian
bn-IN	Bengali
br_FR	Breton
ca-AD	Catalan
ca-ES	Catalan (Spain)
cs-CZ	Czech
cy-GB	Welsh
da-DK	Danish
de-AT	German (Austria)
de-CH	German (Switzerland)
de-DE	German
el-GR	Greek
en_JP	English (Japan)
en-142	English (Asian)
en-AE	English (United Arab Emirates)
en-AU	English (Australian)
en-CA	English (Canadian)
en-CH	English (Swiss)
en-GB	English (UK)
en-HK	English (Hong Kong)
en-IN	English (India)
en-SG	English (Singapore)
en-US	English (US)
en-ZA	English (South Africa)
eo	Esperanto
es-419	Spanish (Latin America)
es-AR	Spanish (Argentina)
es-ES	Spanish
es-MX	Spanish (Mexico)
es-US	Spanish (USA)
et-EE	Estonian
eu-ES	Basque
fa-IR	Persian
fil-PH	Filipino
fj-FJ	Fijian

fo-FO	Faroese (Faroe Islands)
fr-BE	French (Belgium)
fr-CA	French (Canada)
fr-CH	French (Switzerland)
fr-FR	French (France)
fy	Frisian
ga-IE	Irish (Ireland)
gd-GB	Scottish Gaelic (Scotland)
gl-ES	Galician (Spain)
gu-IN	Gujarati
he-IL	Hebrew
hi-IN	Hindi
hr-HR	Croatian
hsb-DE	Sorbian (Upper)
hu-HU	Hungarian
hy-AM	Armenian
hy-AM-arevela	Eastern Armenian
ia	Interlingua
id-ID	Indonesian
is-IS	Icelandic
it-IT	Italian
kk-KZ	Kazakh
km-KH	Khmer (Cambodia)
kn-IN	Kannada (India)
ko-KR	Korean
ku-TR	Kurdish (Turkey)
la	Latin
ln-CG	Lingala
lt-LT	Lithuanian
lv-LV	Latvian
mg-MG	Malagasy (Madagascar)
mi-NZ	Maori
mk-MK	Macedonian
ml-IN	Malayalam (India)
mn-MN	Mongolian
mr-IN	Marathi
ms-MY	Malay (Malaysia)
nb-NO	Norwegian Bokmaal (Norway)
ne-NP	Nepali
nl-BE	Flemish
nl-NL	Dutch
nn-NO	Norwegian Nynorsk (Norway)
nso-ZA	Northern Sotho (South Africa)
ny-MW	Chichewa (Malawi)

oc-FR	Occitan
or-IN	Oriya
pa-PA	Punjabi
pl-PL	Polish
pt-BR	Portuguese Brazil
pt-PT	Portuguese
qu-PE	Quechua
ro-RO	Romanian
ru-RU	Russian
rw-RW	Kinyarwanda (Rwanda)
sk-SK	Slovak
sl-SI	Slovenian
sq-SQ	Albanian
sr_ME_Cyrl	Serbian - Montenegro (Cyrillic)
sr_ME_Latn	Serbian - Montenegro (Latin)
sr_RS_Cyrl	Serbian (Cyrillic)
sr_RS_Latn	Serbian - Serbia (Latin)
sr-YU	Serbian
ss	Siswati
sv-SE	Swedish
sw-KE	Kiswahili (Africa)
ta-IN	Tamil
tet-ID	Tetum (Indonesia)
th-TH	Thai
tk-TM	Turkmen
tl-PH	Tagalog
tr-TR	Turkish
ts-ZA	Tsonga
uk-UA	Ukrainian
ur-IN	Urdu
uz-UZ-Cyrl	Uzbek (Cyrillic)
vi-VN	Vietnamese
xh-ZA	Xhosa (South Africa)
yi	Yiddish
zu-ZA	Zulu (Africa)

15. Appendix 4: Languages supported by the Grammar Checker

Arabic
Asturian
Belarusian
Breton
Catalan Variants for: Valencia
Chinese
Danish
Dutch Variants for: Belgium
English Variants for: Australia, Canada, UK, New Zealand, South Africa, US
Esperanto
French
Galician
German Variants for: Austria, Germany, Switzerland
Greek
Irish
Italian
Japanese
Khmer
Persian
Polish
Portuguese Variants for: Angola, Brazil, Mozambique, Portugal
Romanian
Russian
Slovak
Slovenian
Spanish Variants for: Voseo
Swedish
Tagalog
Tamil
Ukrainian

16. Appendix 5: Specification for an Excel file to import linguists

Column	Sample data 1	Sample data 2	Format	Comments
Title	Mr		text	
First Name	John	Pierwsze	text	Obligatory field
Last Name	Smith	Ostatnie	text	Obligatory field
Job Title	Linguist		text	
Roles	translator,reviewer,tm expert,terminologist	translator	text	Obligatory field
Username	JohnADMIN	uzytkownik	text	Obligatory field
Password	john	haslo	text	Obligatory field
E-mail address	noreply@xtm-intl.com	noreply@xtm-intl.com	text	Obligatory field
Address 1	1 Lower Loxley		text	
Address 2	High Street		text	
City	Ambridge		text	
State/County	Wessex		text	
Postcode/ZIP	SL16 3PJ		text	
Country	GBR	FRA	text	Must use the 3-letter abbreviation for the country
Phone 1	+441494532343		text	
Phone 2	+441494532344		text	
Mobile phone	+447966477181		text	
Fax number	+447966477180		text	
WWW	www.gmail.com		text	
Skype	skypeId		text	
MSN	msnId		text	
Language Combinations	(fr_CA>en_US)	pl_PL>en_GB	text	Obligatory field (Source Language code>target language code)
Qualifications	en_GB>Qualification name, en_GB>BSc		text	language code>qualification
Domains	automotive, pharmaceutical		text	
TM Access Rights	modify,export		text	Options: view, add, modify, export, import
Terminology Access Rights	add,modify		text	Options: view, add, modify, export, import

To add TM and terminology access rights the user needs to be given the respective role

17. Appendix 6: Specification for an XML import files

Example XML file for importing users

```
<?xml version="1.0" encoding="UTF-8"?>
<suppliers>
	<supplier>
		<user>
			<firstname>TestFirstname</firstname>
			<lastname>TestLastname</lastname>
			<emailaddress>TestEmailaddress</emailaddress>
			<username>TestUsername</username>
			<password>TestPassword</password>
			<title>TestTitle</title>
			<timezone>TestTimezone</timezone>
			<preferredlanguage>en_GB</preferredlanguage><!-- undescrored or dashed IANA codes ->
		</user>
		<address>
			<street>TestStreat</street>
			<number>TestNumer</number>
			<city>TestCity</city>
			<state>TestState</state>
			<postalCode>TestPostalCode</postalCode>
			<country>TestCountry</country>
			<phone1>TestPhone1</phone1>
			<phone2>TestPhone2</phone2>
			<mobilephone>TestMobilephone</mobilephone>
			<fax>TestFax</fax>
			<www>TestWWW</www>
			<skypeId>TestSkypeId</skypeId>
			<msnId>TestMSN</msnId>
			<icqId>TestICQ</icqId>
			<jabberId>TestJabber</jabberId>
		</address>
		<roles><!-- uppercase or lowercase, values: translator, reviewer, corrector ->
			<role>translator</role>
			<role>reviewer</role>
		</roles>
		<languagecombinations>
			<!-- currency values: dollar, euro, morrocan_dirham, pound, yen ->
			<!-- undescrored or dashed IANA codes ->
			<combination source="en_GB" target="pl_PL" costperword="1" currencyperword="euro" costperhour="1" currencyperhour="euro" />
			<combination source="en_GB" target="fr_FR" costperword="2" currencyperword="euro" costperhour="2" currencyperhour="euro" />
		</languagecombinations>
		<domains>
			<!-- AEROSPACE,AGRICULTURE,AUTOMOTIVE,PRINTING,BUILDING_AND_CONSTRUCTION,BUISNESS_AND_COMMERCE,CONSULTING,ECONOMICS,EDUCATION,ELECTRICAL_GOODS,ENGINEERING,FINANCE,INFORMATION_TECHNOLOGY,LAW,MEDICAL,MUSIC_AND_ARTS,PHARMACEUTICAL,REAL_ESTATE,RETAIL,SPORTS_RECREATION,TELECOMMUNICATIONS,TRANSPORT,TRAVEL ->
			<domain>LAW</domain>
			<domain>MEDICAL</domain>
		</domains>
		<qualifications>
```

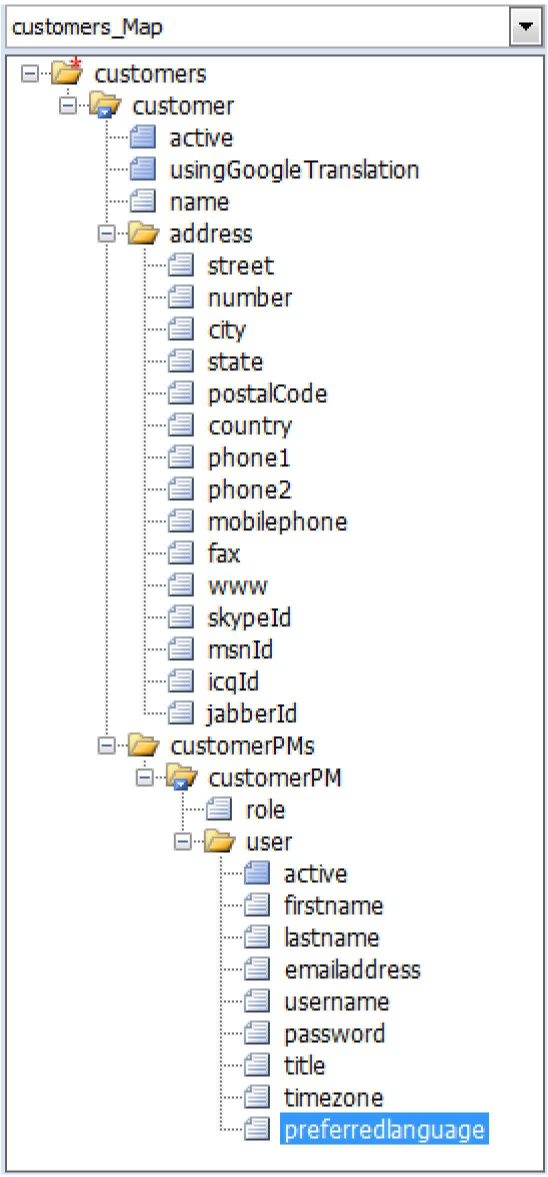
```
				<!-- underscrored or dashed IANA codes ->
				<qualification date="2009-01-01" language="en_GB">
					<name>TestQualificationName1</name>
					<description>Test description of qualification</description>
				</qualification>
			</qualifications>
		</supplier>
		<supplier>
			<user>
				<firstname>TestFirstname</firstname>
				<lastname>TestLastname</lastname>
				<emailaddress>TestEmailaddress</emailaddress>
				<username>TestUsername</username>
				<password>TestPassword</password>
			</user>
			<address>
				<city>ObligatoryTestCity</city>
				<country>ObligatoryTestCountry</country>
				<phone1>ObligatoryTestPhone1</phone1>
			</address>
			<languagecombinations>
				<combination source="en_GB" target="pl_PL" costperword="1" currencyperword="euro"
costperhour="1" currencyperhour="euro" />
			</languagecombinations>
		</supplier>
</suppliers>
```

Example file for importing customers

```
<?xml version="1.0" encoding="UTF-8"?>
<customers>
    <customer active="true" usingGoogleTranslation="true"><!-- true,false ->
        <name>TestName</name><!-- unique value ->
        <address>
            <street>TestStreat</street>
            <number>TestNumer</number>
            <city>TestCity</city>
            <state>TestState</state>
            <postalCode>TestPostalCode</postalCode>
            <country>TestCountry</country>
            <phone1>TestPhone1</phone1>
            <phone2>TestPhone2</phone2>
            <mobilephone>TestMobilephone</mobilephone>
            <fax>TestFax</fax>
            <www>TestWWW</www>
            <skypeId>TestSkypeId</skypeId>
            <msnId>TestMSN</msnId>
            <icqId>TestICQ</icqId>
            <jabberId>TestJabber</jabberId>
        </address>
        <customerPMs>
            <customerPM>
                <role>MANAGER</role><!-- MANAGE,VIEWER ->
                <user active="true">
                    <firstname>TestFirstname</firstname>
                    <lastname>TestLastname</lastname>
                    <emailaddress>TestEmailaddress</emailaddress>
                    <username>TestUsername</username>
                    <password>TestPassword</password>
                    <title>TestTitle</title>
                    <timezone>TestTimezone</timezone>
                    <preferredlanguage>en_GB</preferredlanguage><!-- undescrored or dashed
IANA codes ->
                </user>
            </customerPM>
        </customerPMs>
    </customer>
        <customer active="true" usingGoogleTranslation="true">
        <name>TestName2</name>
        <address>
            <city>ObligatoryTestCity</city>
            <country>ObligatoryTestCountry</country>
            <phone1>ObligatoryTestPhone1</phone1>
        </address>
        <customerPMs>
            <customerPM>
                <role></role>
                <user active="true">
                    <firstname>ObligatoryTestFirstname</firstname>
                    <lastname>ObligatoryTestLastname</lastname>
                    <emailaddress>ObligatoryTestEmailaddress</emailaddress>
                    <username>ObligatoryTestUsername</username>
                    <password>ObligatoryTestPassword</password>
                </user>
            </customerPM>
            <customerPM>
                <role></role>
                <user active="true">
                    <firstname>ObligatoryTestFirstname2</firstname>
                    <lastname>ObligatoryTestLastname2</lastname>
                    <emailaddress>ObligatoryTestEmailaddress2</emailaddress>
                    <username>ObligatoryTestUsername2</username>
                    <password>ObligatoryTestPassword2</password>
                </user>
            </customerPM>
        </customerPMs>
    </customer>
</customers>
```

The red section shows the full data set. The section in blue shows an obligatory sub-set.

The XML file can contain all the customers where every customer element represents one customer. If a customer already exists in XTM then the record is skipped and not imported.



The customer map

Example file for setting language combinations

<language-combinations>
<language-combination source="en_GB" target="af_ZA" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="sq_SQ" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="ar_AA" pricefactor="1.0" durationfactor="1.0" autoQuoting="true" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
<language-combination source="en_GB" target="be_BY" pricefactor="1.0" durationfactor="1.0" autoQuoting="false" percharacters="false" minimumchargefactor="1.0" minimumtextcount="-1" activity="true"/>
</language-combinations>

18. Appendix 7: ITS rules

Example ITS rules file 1

Each .its file contains ITS rules for a particular file format. An example of such file is shown below.

```
<?xmlversion="1.0"encoding="UTF-8"?>
<its:rulesits:version="1.0"xmlns:its="http://www.w3.org/2005/11/its">

<its:translateRuleselector="//*"translate="no"/>
<its:translateRuleselector="//text"translate="yes"/>

<its:withinTextRuleselector="//var"withinText="yes"/>

</its:rules>
```

Example ITS rules file 2

```
<?xml version="1.0" encoding="UTF-8"?>
<its:rules version="1.0" xmlns:its="http://www.w3.org/2005/11/its">
 <its:translateRule selector="//P" translate="yes"/>
 <its:withinTextRule selector="//P" withinText="no"/>

 <its:translateRule selector="//Br" translate="no"/>
 <its:withinTextRule selector="//Br" withinText="nested"/>

 <its:translateRule selector="//B" translate="yes"/>
 <its:withinTextRule selector="//B" withinText="yes"/>
</its:rules>
```

Further information about ITS rules is available at: http://www.w3.org/TR/its/

Example SRX rules file

```
<?xml version="1.0"?>
<srx version="2.0" xmlns="http://www.lisa.org/srx20" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:schemaLocation="http://www.lisa.org/srx20 srx20.xsd">
    <header cascade="no" segmentsubflows="no">
        <formathandle type="start" include="no"/>
        <formathandle type="end" include="yes"/>
        <formathandle type="isolated" include="yes"/>
    </header>
    <body>
        <languagerules>
            <languagerule languagerulename="English">
                <rule break="no">
                    <beforebreak>(^|\s|\p{Ps}|\p{Po}|(&lt;[^&gt;]*&gt;))Std\.</beforebreak>
                    <afterbreak>\s</afterbreak>
                </rule>

                <rule break="yes">
                    <beforebreak>[.?!;]</beforebreak>

    <afterbreak>(\s| )*+(&lt;[^&gt;]*&gt;(\s| )*+)*+(\s| )*+$</afterbreak>
                </rule>
            </languagerule>
        </languagerules>
        <maprules>
            <maprule maprulename="Default">
                <languagemap languagepattern="en*" languagerulename="English"/>
            </maprule>
        </maprules>
    </body>
</srx>
```

19. Appendix 8: Minimum Server Requirements

Minimum Server Requirements

The server specifications will depend on the expected number of concurrent users. We recommend that XTM be installed on bare metal servers. The following is a guideline for the minimum server specifications.

System size (XTM will help you decide on the best option based on your requirements)	**Small** Department or small company	**Medium** Company	**Large** Enterprise
CPU Cores/threads per machine	8/16	12/24	16/32
RAM (GB) per machine	128	128	256
SSD Disk space for files in active projects, db and application	500GB	1TB	2TB
HDD Disk space for archived projects & local backups	500GB	1TB	2TB
Number of machines in cluster	1	2	3-4
OS - 64-bit versions	Linux	Linux	Linux

Storage

Storage requirements depend on the number of active and archived projects, types and size of source files, and size of TM. Servers must have SSD drives for active projects and the database. Archived projects can either be stored on magnetic drives or, for additional cost, sent to Amazon S3 storage. The preferred OS is Centos 7.

Software runtime environment

- Java 8 Oracle or OpenJDK
- Applications
    - Libre/Open Office v4.0 or later
    - Database: PostgreSQL 9.6

Network requirements

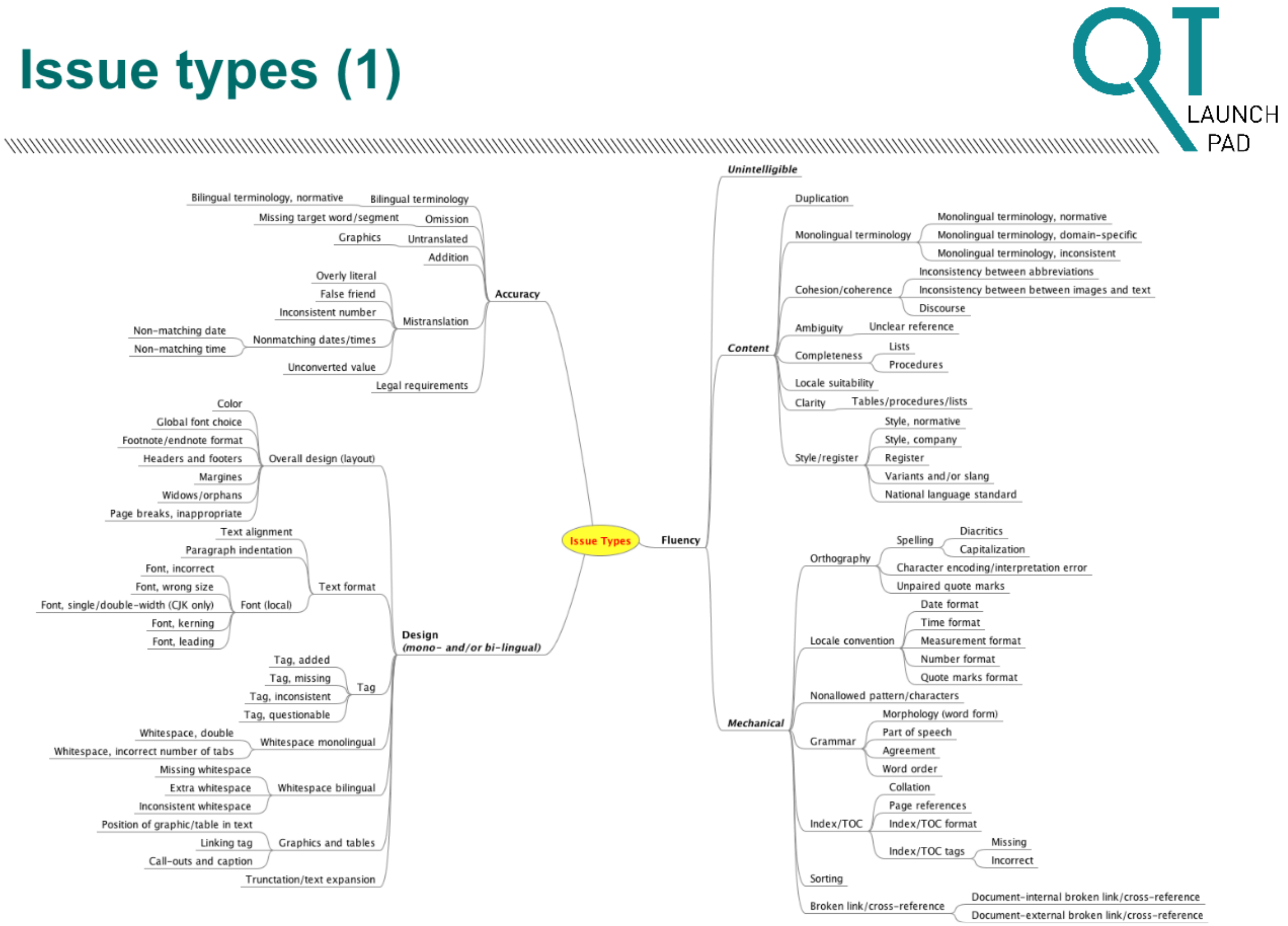
XTM International offers a content delivery network to improve global access. Within the server cluster, including the database server, a minimum 1 gbit local network is required.

Internet:
Server bandwidth: greater than 10Mbit/s, depending on the number of concurrent users.
User bandwidth: 2Mbit/s or better.

XTM International will be happy to provide further advice about server specifications and configuration for specific installations.

20. Appendix 9: LQA - MQM Issue Hierarchy

LQA - MQM Issue Hierarchy



For an overview of the structure of the Multidimensional Quality Metrics (MQM)’s set of issue types including a description and examples of each type, please see the online *description of issue types*

21. Appendix 10: Supported File formats

XTM supports the following file formats for translation:

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

22. Appendix 11: Regular expressions

Regular expressions can be used to:

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

23. Appendix 12: Preparing files for translation

Excluding text from translation in the Microsoft Office files

If you are translating Microsoft Word or Excel spreadsheets it is possible to exclude certain text by creating and setting the text to one of the following styles:

Donottranslate

Donottranslate

DoNotTranslate

tw4winExternal

Alternatively:

1. Hide the text in Microsoft Word. (Go to the Fonts dialog box > Effects > Hidden)
2. Hide the row/column in Microsoft Excel.

Translating embedded Excel file inside Microsoft Word

If an MS Word document contains an embedded Excel file, then XTM will include the Excel text for translation. However, what is taken for translation depends on the Excel file that was used:

- ***.xls** all sheets are taken to translation.
- ***.xlsx** only the active sheet is taken for translation.

Translating table of contents

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

Processing XLIFF files

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

- Easyling
- Ixiasoft
- SDLXLIFF

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

SDLXLIFF has two options:

1) segmented source:
XTM keeps the segmentation and does not segment the text further.
2) un-segmented source: XTM segments the source.

To maintain the SDL segmentation and ensure that the TM is consistent between the two tools, we recommend using option 1.

There are four ways in which XTM can be configured to interpret SDLXLIFF translations:

1) Translated segments are matched as ICE.
2) Translated segments are matched as Leveraged match. This will look similar to ICE but will not have the ICE green status.
3) Translated segments are put as target in Editor, without any match.
4) XTM will take the level of the match from the source file in <sdl> node (example: <sdl:seg id="52" conf="Draft" origin="tm" origin-system="General Content EN-UK TM Seq" percent="55"/>) , adapting it to XTM standards: if the match is below fuzzy-75%, XTM will round it up to 75%

When the text in <target> nodes in the source file is the same as in <source> node, XTM will just ignore the filled-out target.

Please contact XTM support for assistance with the configuration.

24. Appendix 13: Best practices

Displaying images in XTM Visual mode

To display images in Visual mode, make sure to handle HTML files correctly.

Use one of the following:

1. Use an absolute path pointing to the image (full URL), for example:

```
<img src=https://xtm-intl.com/stickman.gif>
```

2. Include a base tag in the head element of the HTML file, for example:

```
<head>
<base href="http://xtm-intl.com/" target="_blank">
</head>
```

Do **not** use relative path for the image source such as this, pointing to a folder saved on your computer.

```
<img src="/images/stickman.gif">
```

Preparing InDesign files for translation in XTM

1. Make sure that the InDesign file has the correct file structure.
    - Avoid using text for translation inside images. Text inside raster images (such as png/jpg/jpeg) **cannot** be sent for translation
    - Make sure to show hidden characters
    - Use hard return correctly (to create a new paragraph, **not** to wrap text)
    - Avoid using tabulation: use indentation instead
    - Use Paragraph styles to format text
    - Make sure that the language attribute is applied correctly
    - Pay attention to hyphenation
2. Make sure that the content you do not want to translate is either on the hidden or locked layer. By default, it is **not** extracted by XTM.
3. Design text boxes so that there is plenty of space left for translation which might be significantly longer than the source text. If the text box is too small, the translated text overflows and requires additional DTP.
4. Choose **IDML** rather than INDD files to avoid issues related to versioning.
5. Use InDesign packages to enable translating in context. To create an InDesign package, go to File > Package. The resulting zip folder contains all images and fonts. Once uploaded to XTM, the translator can take into consideration layout constraints.
6. The upload limit on XTM Cloud is **550 MBs**. The upload limit on most private servers is **150 MBs.**

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Protecting sensitive data during translation in XTM

To protect sensitive data during translation, apply custom styles in MS Word.
As a result, there is no risk of data leak, whether the text is translated by a human translator or through machine translation.

This feature is available for all languages.

1. Create a custom style in MS Word named 'anon' or 'onlyanon'. Use a different font color to make the styled text visible.

- **'anon'** style
  in addition to the selected text, automatically anonymizes:
  - all numeric values
  - URLs
  - email addresses

- ***'onlyanon' style***
  anonymizes the text selected with that style only

2. Apply the style to the text you want to protect.

For detailed instructions on how to create styles in MS Word check the Microsoft Office website.

The text with the applied style is converted into an inline tag in XTM Workbench.
Once the localization is complete, and the target document is recomposed, the sensitive data is automatically reinserted into the text.

Note: Use 'hidden' font to achieve similar results.

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