Automating your translation project

How to use project templates & workflow automation in memoQ server

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Introduction

The idea behind project templates and workflow automation in memoQ is a very simple desire to make the project manager more productive. When creating a new project, there is an awful lot of repetition. We wanted to reduce the number of clicks needed before launching a project. We came up with the arbitrary number of 80%. We hoped that a feature that reduces the amount of work on a given task by four-fifths would very likely be welcome.

Since we introduced project templates, we heard good reports from customers who were saving a considerable amount of time, and benefiting from this innovation. However, it is also apparent that many memoQ users are unaware of project templates. With this book, we hope to inform more people of the benefits they can achieve with this technology.

This eBook is aimed at project managers who work with memoQ server. It is an introduction that will allow you to get started with project templates. However, there is some very powerful functionality here. If you take the time to learn working with project templates, you could be rewarded with spectacular process automation.

The chapters in this book cover the following topics:

- **WHY PROJECT TEMPLATES** – This section takes you through the process memoQ went through in coming up with project templates.
- **GETTING STARTED** – This section shows you the first steps in designing a project template –taking an existing workflow and automating.
- **CREATING A PROJECT TEMPLATE** – As the name suggests, this is an introduction to creating a project template.
- **NAMING PATTERNS** – These are crucial to better management of project resources. When you use naming patterns to set names for TMs (translation memories) and other resources, you can keep track of and reuse resources more easily.
- **AUTOMATING FILE EXPORTS** – This is just one of the actions you can automate: It allows you to automatically export the file after a trigger has occurred.

Much of the content of this book was originally published as blog posts written by our former colleague, Monika Antunovics. We would like to thank her for her continued support and encouragement.
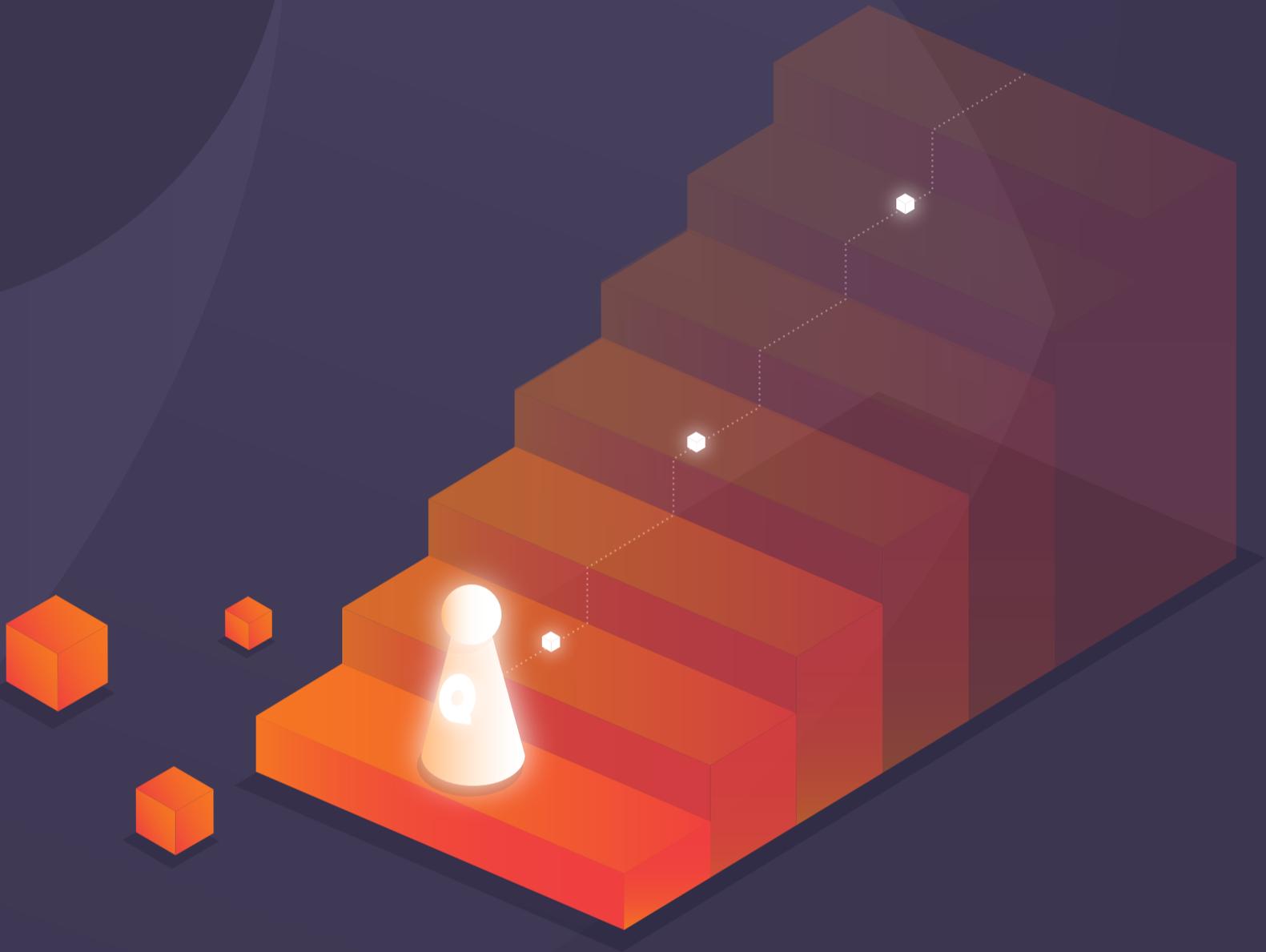
01

Getting started

Getting started

You should start by writing out or drawing a diagram of the process you want to automate. It is possible to automate most of the steps in the process. You should decide on what you will and will not automate.

The diagram below is a very simple workflow we have created around a translation project.

```
Project Start
     ↓
Enter project data  →  Assign to translator  →  Translate      →  Final check         →  Delivery
     ↓                      ↑                         ↓                  ↑                     ↓
Add files for          Pre-translation       Deliver from          QA                Project archive
translation                                  translator
     ↓                      ↑                         ↓                  ↑                     ↓
Add TMs,            →  Perform project    →   Revision      →  Delivery from    →   Project end
Terminology and        analysis                                revision
other resources
```
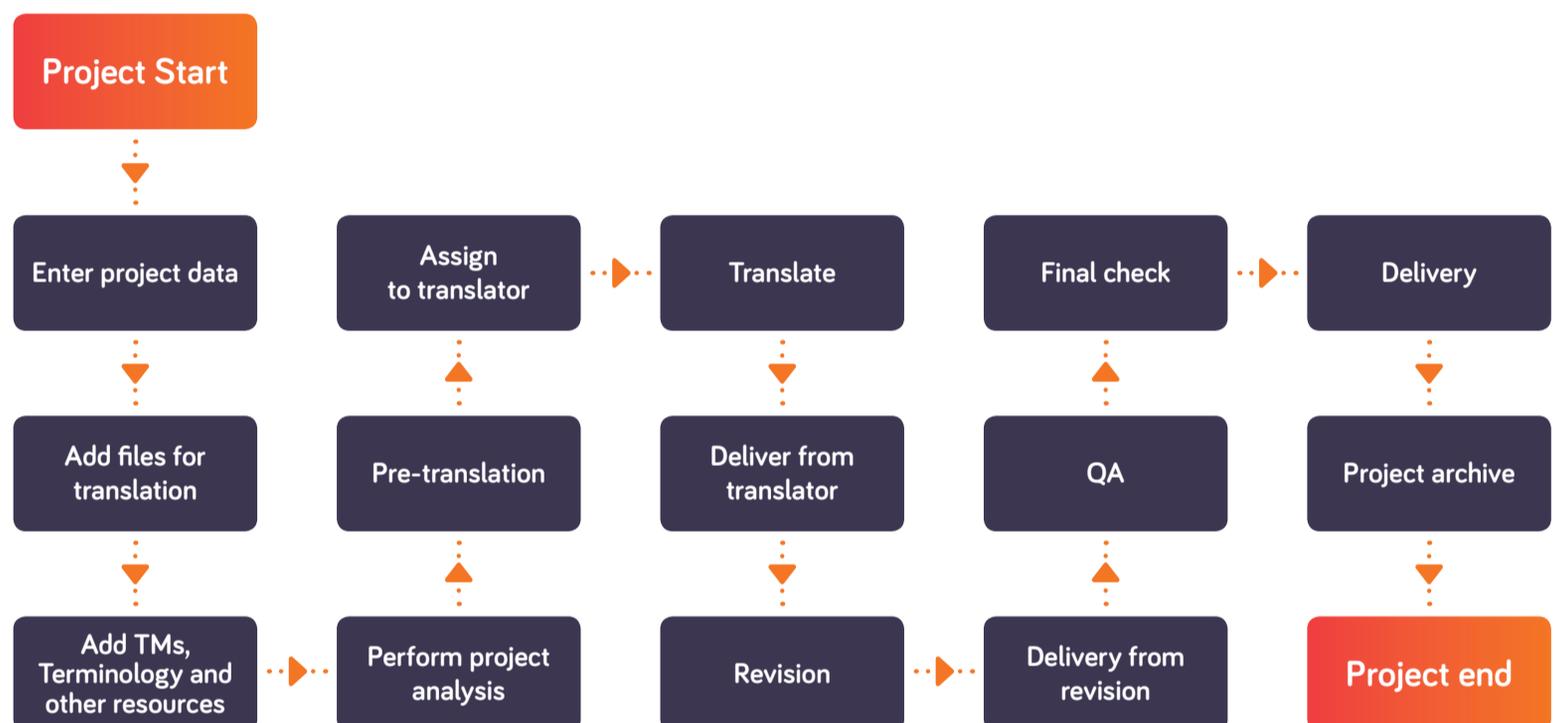
You want to do several things with this project. You want to automate as much as you can. You also want to be able to use the same TM, LiveDocs and terminology resources every time you receive a similar job.

You review the workflow, and confirm that the steps in green are the ones you want to automate, those in orange are to be semi-automated, and those in blue are manual steps. You create the project as described below, and automate the steps as described in the section on Automating file exports.
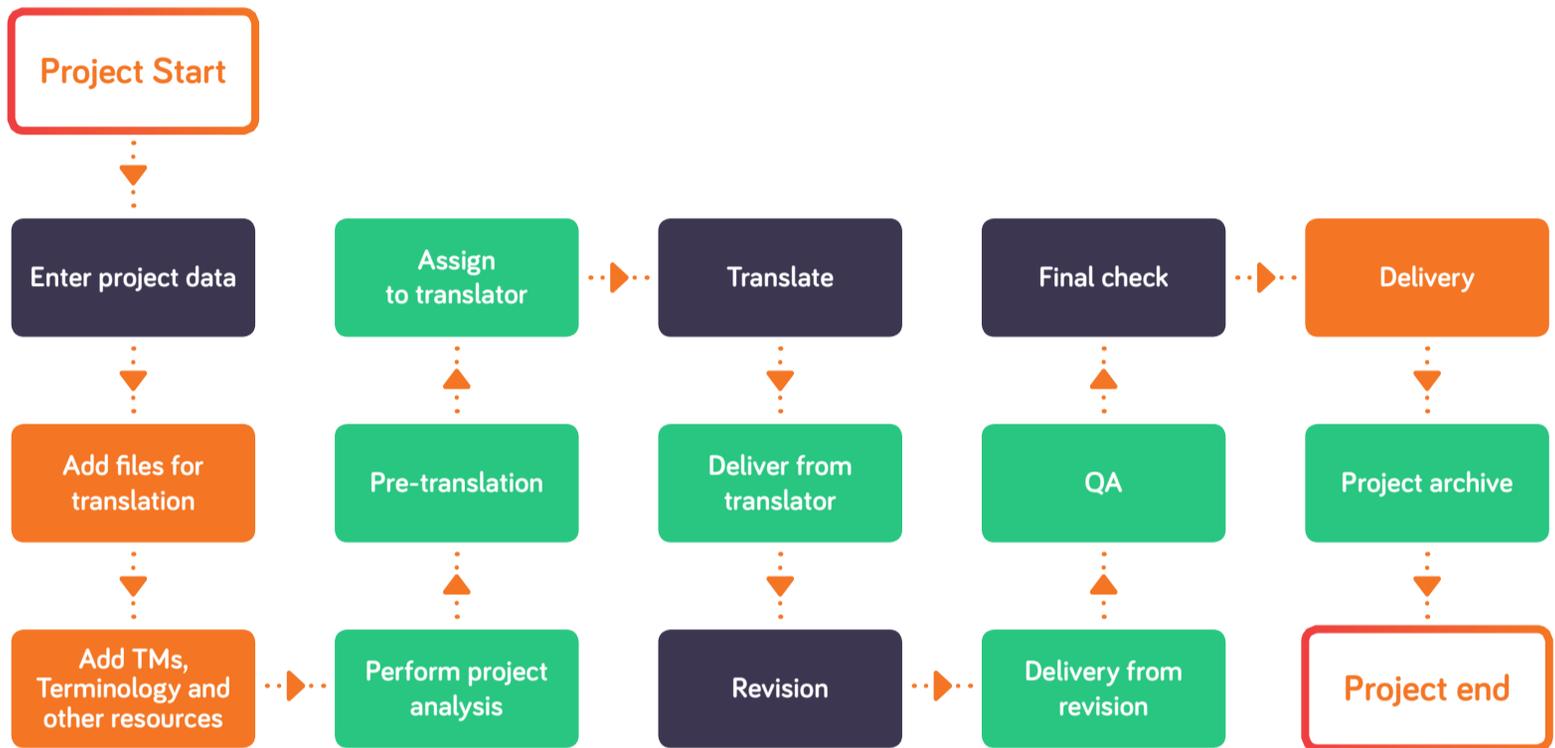
You also want to ensure that when similar projects occur at a later stage, you can find them and leverage the resources involved in previous projects. You do that by using naming patterns and placeholders in the TM names in the template – as in "{Client}-{Subject}-{SrcLangIso2}-{TmTrgLangIso2}-Working". This means that when you create another project with the same client, subject and language pair, it will use the same TM. If you are from a translation company, we suggest that you define workflows for your regular customer, and then convert these to project templates.

02

Creating a project template

Creating a project template

Start by opening the Resource Console, and clicking the resource type "Project templates":
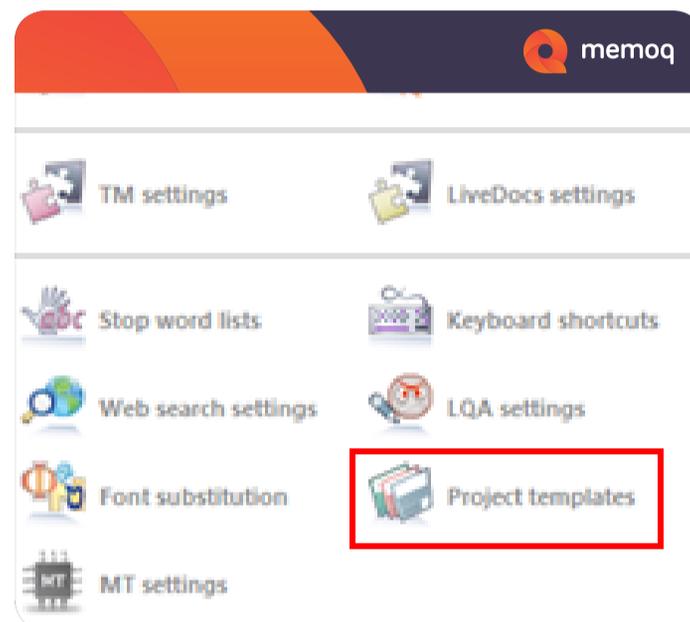
You can create a new one and then edit it, just like you do with any other resource. When you start editing a project template, it will be a local or online template, depending on whether it's stored on your computer or a memoQ server. However, it is very easy to switch between local and online project settings: just click the eye-shaped icon at the top right corner of the template editor window:
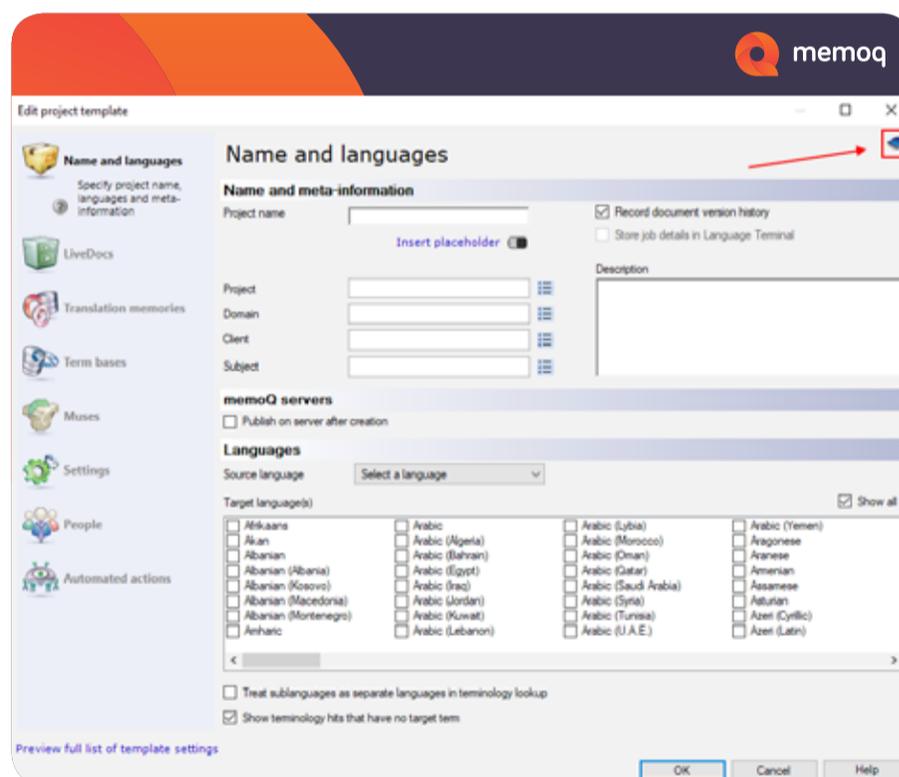
If you click it when editing a local template, you get a new category, "Online project settings", and some other settings in the already seen categories – in particular, the automation options – are expanded:
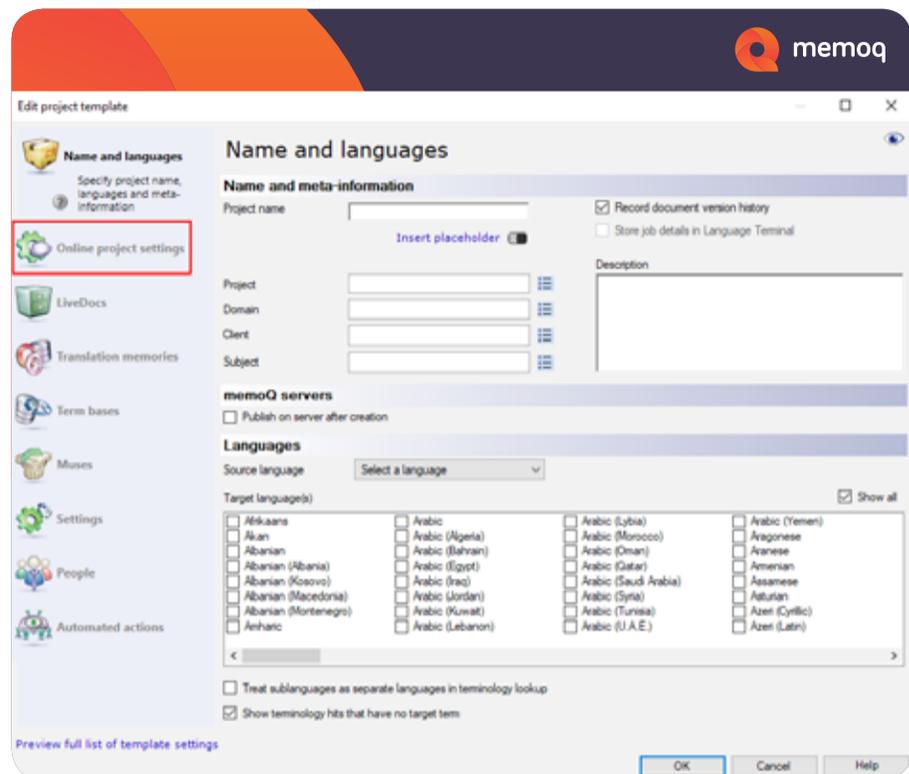
Another handy feature of this dialog is the "Preview full list of template settings" link at the bottom of the window:
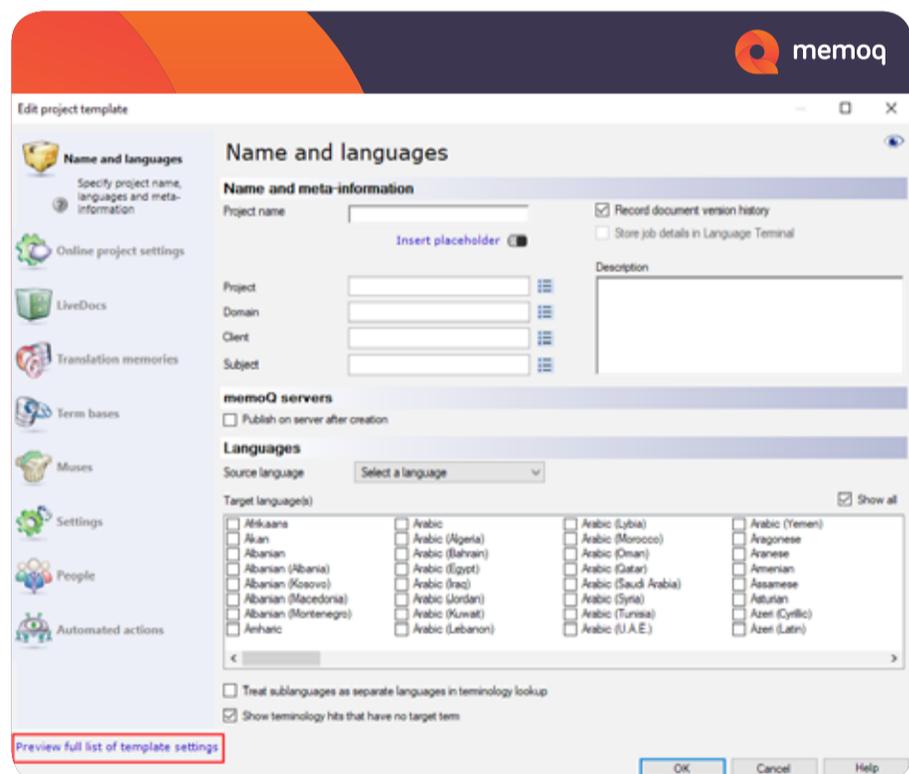
Clicking it will open an HTML page which is suspiciously similar in design to the project settings pages, and there is a reason for it – when you ultimately create a new project from your template, you'll be able to see the very same settings in the project management interface. This is how the page looks like when invoked from the template editor:
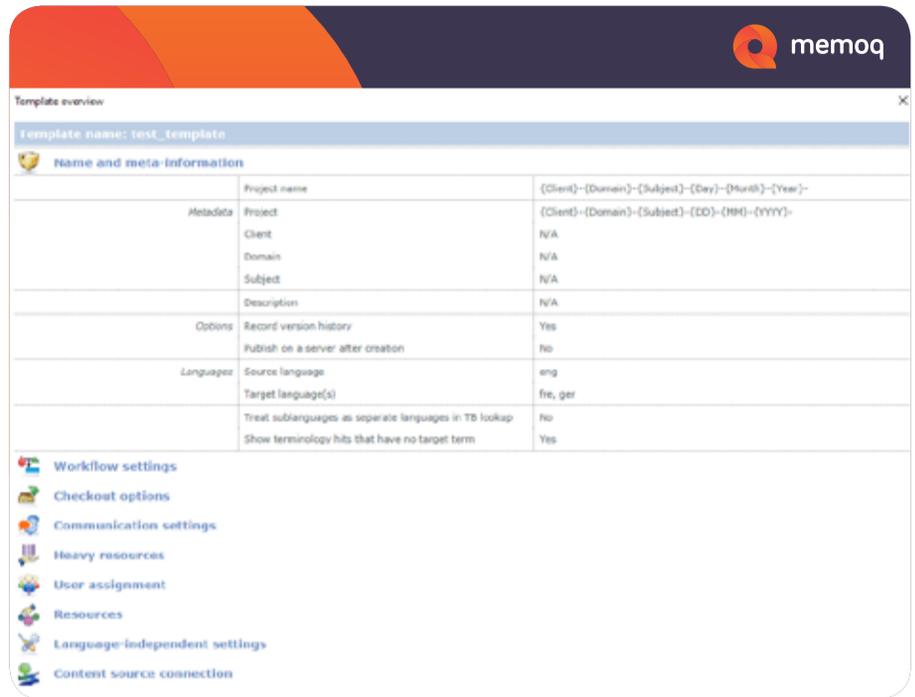
And this is the same page in the project management interface:
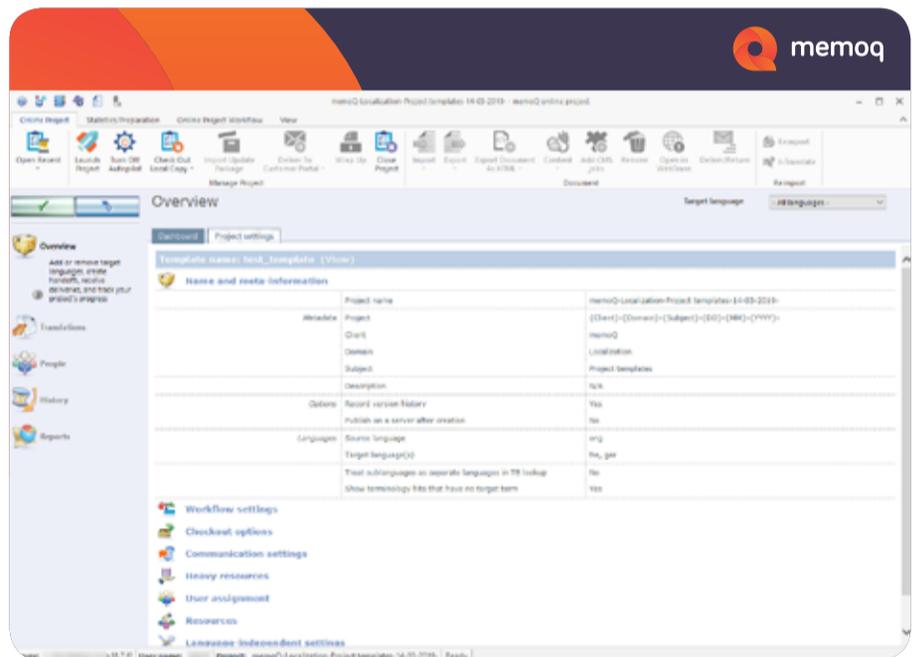
A surprising amount of time went into designing it, trying to fit it into as little space as possible, while still allowing the PM to quickly find any setting. Looking at this page reminds you of all the things memoQ is capable of – amazing, isn't it?

03

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Naming patterns

Naming patterns

Our language service provider customers often told us that with the large number of projects they are managing, they need some type of naming convention (call it a rule, system or pattern) to navigate the hundreds of projects they are running. Highly multilingual projects (e.g. those with 30 or 50 target languages) also need a system for naming resources, especially bilingual ones like TMs.

We wanted to help project managers reduce the number of clicks. So we created naming conventions for projects and resources. As an added bonus, PMs can automatically create the properly named resources, and add them to their projects. No more creating fifty TMs and adding them one by one – you just create one naming pattern in the template, and memoQ takes care of the rest. Think about it for a moment! A positive side effect is that when you create projects and resources using templates with naming rules, you have a far smaller chance of accidentally mistyping a resource's name – which would mean you cannot find it later.

To set up a naming rule, you need to use placeholders in the name. There is one for the four metadata fields which belong to practically every object in the memoQ universe: Project, Client, Domain and Subject. Plus some obvious metadata you might want to use in your project and resource names, like source language, target languages or dates.

To use these placeholders in names, just click the "Insert placeholder" link below the text entry field when you are setting up a naming rule:
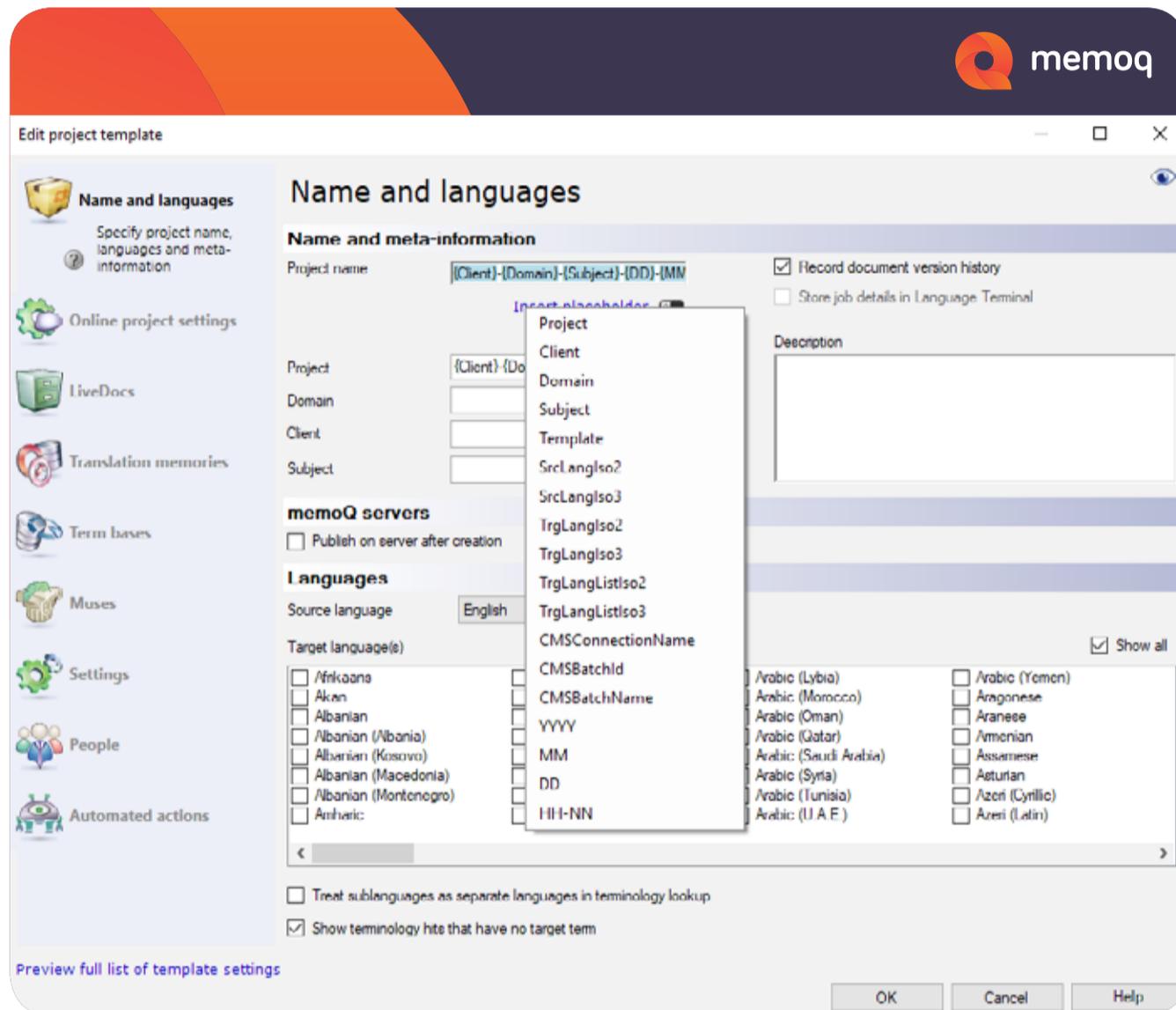
memoQ offers you the placeholders in a drop-down list. The names are quite self-explanatory ("template" refers to the template name, target languages can come one by one, or in a list of all target languages for multilingual projects). We don't have a "date" placeholder, as dates are displayed differently based on Windows' regional settings and on countries – which may be a problem in international organizations. You can set up dates in a uniform and unambiguous way in your organization using the year, month and day placeholders.

Text you type between place-holders is kept unchanged in the name of the project or resource. See the following example:
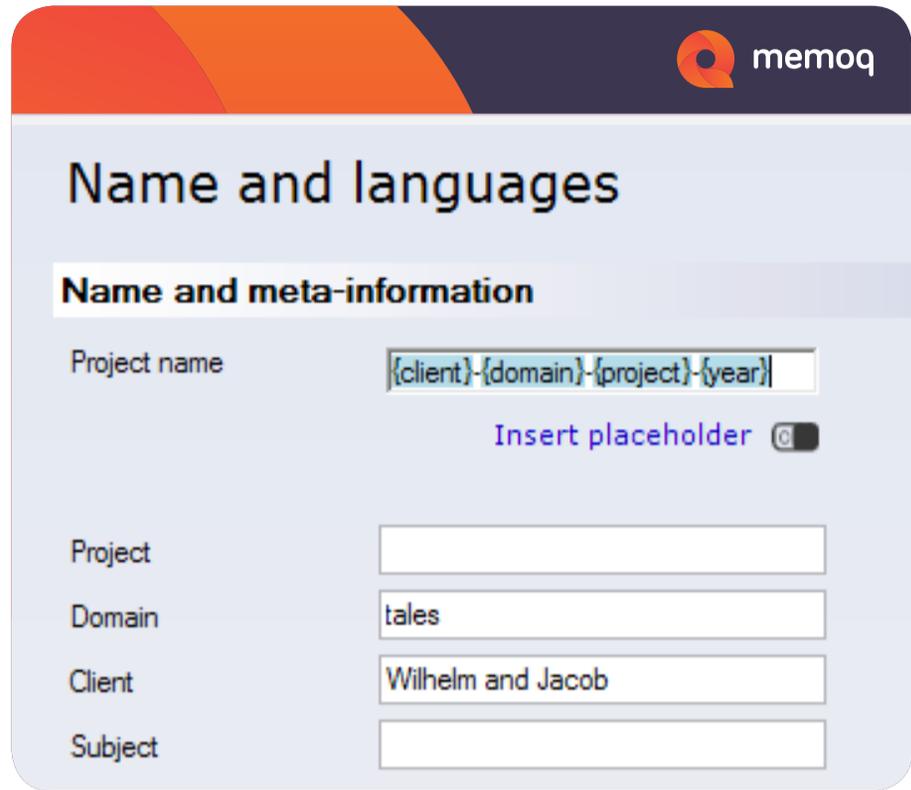
If you create a project from it today, its name will be "Wilhelm and Jacob-tales-" followed by your project name and "-2019". You can check this if you click the small switch to the right of "Insert placeholder":
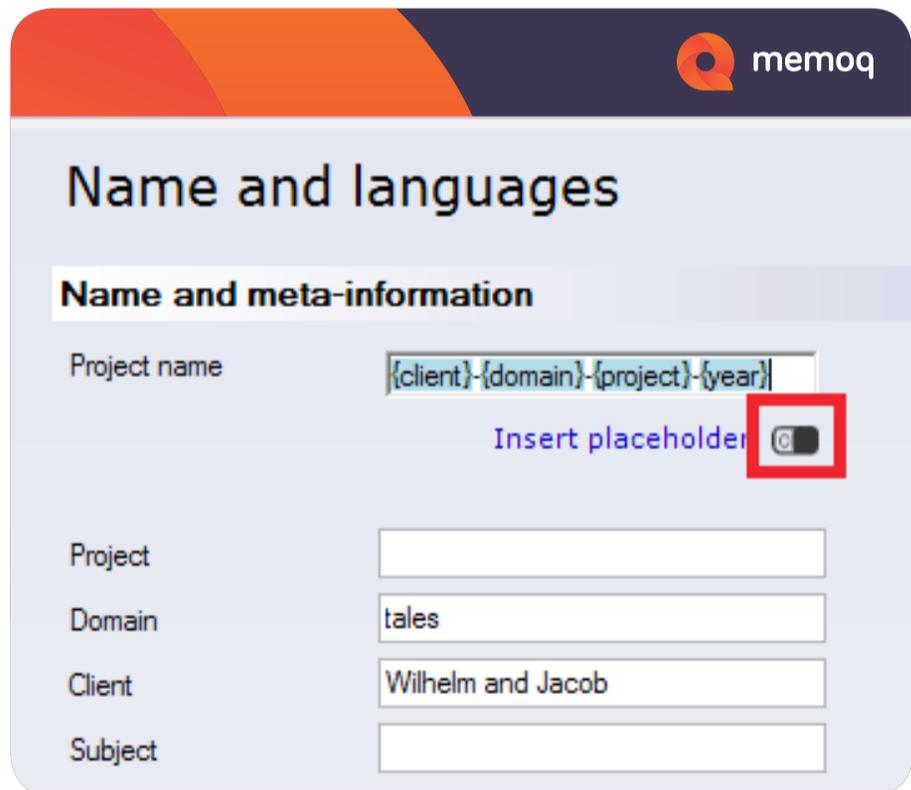
In the above example, when you click the switch, this happens:

You can see that {project} is still left as a placeholder. You don't need to provide it in the template – you can do so when you create your project. memoQ won't let you create the project until you've provided values for all metadata placeholders in the template (of course, you don't need to enter manually placeholders like date elements). If you save the template we've created so far, and then click "Create local project from template" (or "Create online project from template"), then choose the template, and try to advance by clicking "Finish", you'll see a red exclamation mark next to the Project field. It warns you that you need to provide a value there. If you now type "Cinderella", your project will be created with the name "Wilhelm and Jacob-tales-Cinderella-2019" (and this will be immediately reflected in the dialog, as you can see on the below screen shot):

You may have also noticed that the Client and Domain fields are greyed out, i.e. disabled – these are values you already provided in the template, and as such should not be changed. Required fields (fields referred to in the template) are marked in bold, like the Project field here. The Subject field on the

above screenshot is not bold, so you don't need to fill it in. You may still want to do so, for example, to be able to search for projects based on their subject.
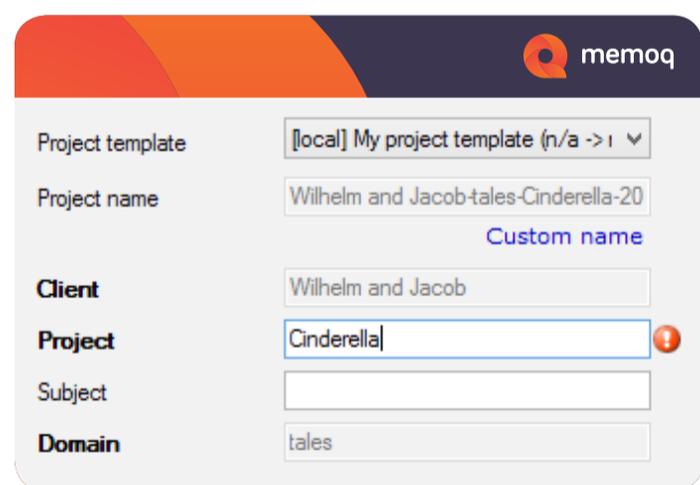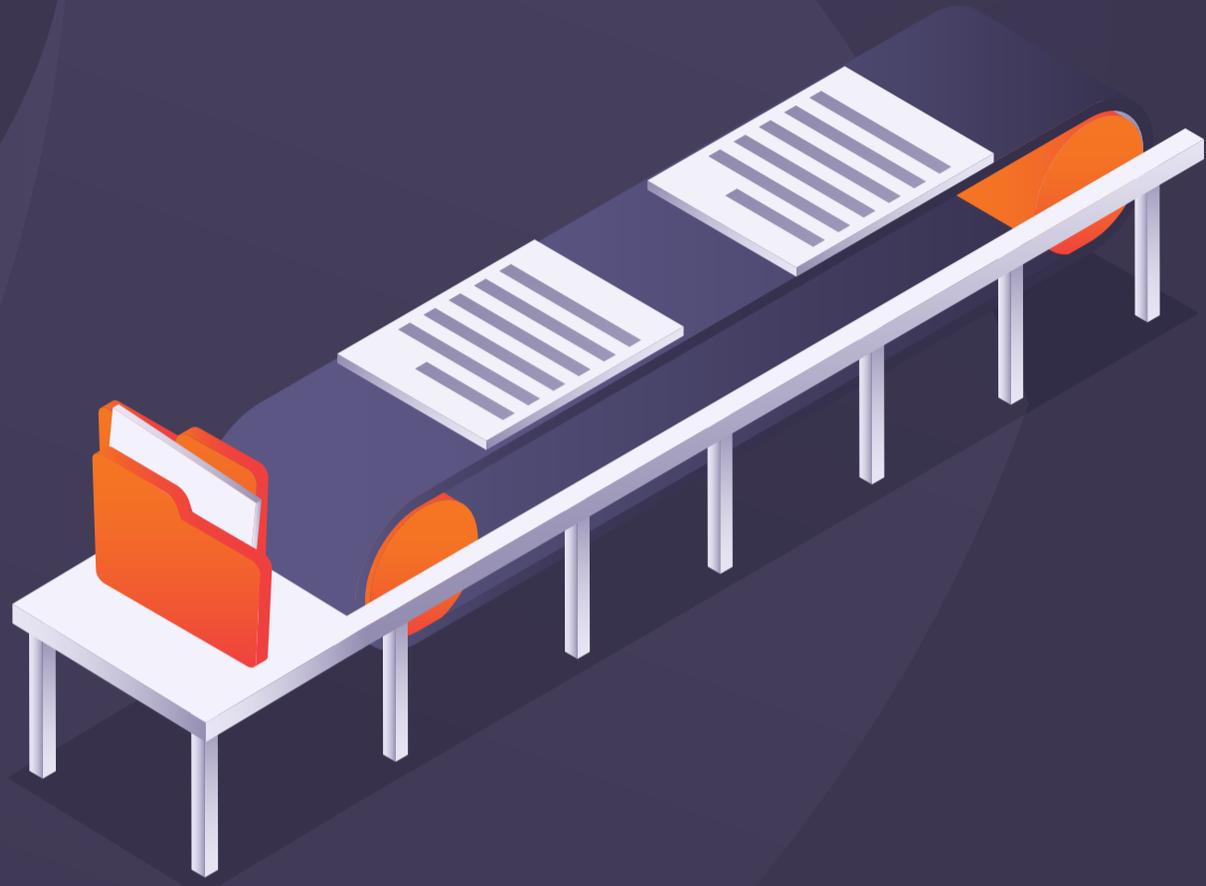
04

Example:
Automating file exports

Example: Automating file exports

SCENARIO

The automated actions in project templates allow you to add automation at certain points (triggers) in the workflows. In this section, we use one particular scenario to show you how this works. You should explore this functionality as there is a lot you can do here.

In this scenario, you are a project manager working for an LSP. Your client has an in-house review process, and would like a two-column RTF file for this review. At the end of the project, they also want a QA report and the translation memories delivered to them.

SOLUTION

Before we introduced project templates, you would have had to manually export everything. For each project you did for this client, you would have done extra work to export the translation memories, QA reports, or other documents. Project templates can do all that automatically for you.

CREATING THE TEMPLATE

Project templates can found in memoQ's Resource console. Start by creating a new online project template. You will then edit this template. In the "Name and languages" tab shown below, we have entered the client name (always "memoQ"), and made the "Project name" a combination of "{Client}-{Project}-{DD}-{MM}-{YYYY}". So, if the project is called "version-9" and the date is 28th April 2019, the full project name will be "memoQ-version-9-28-04-2019".

You have also decided that for this client, the source language will always be English, but you do not know the target languages until the project is created.
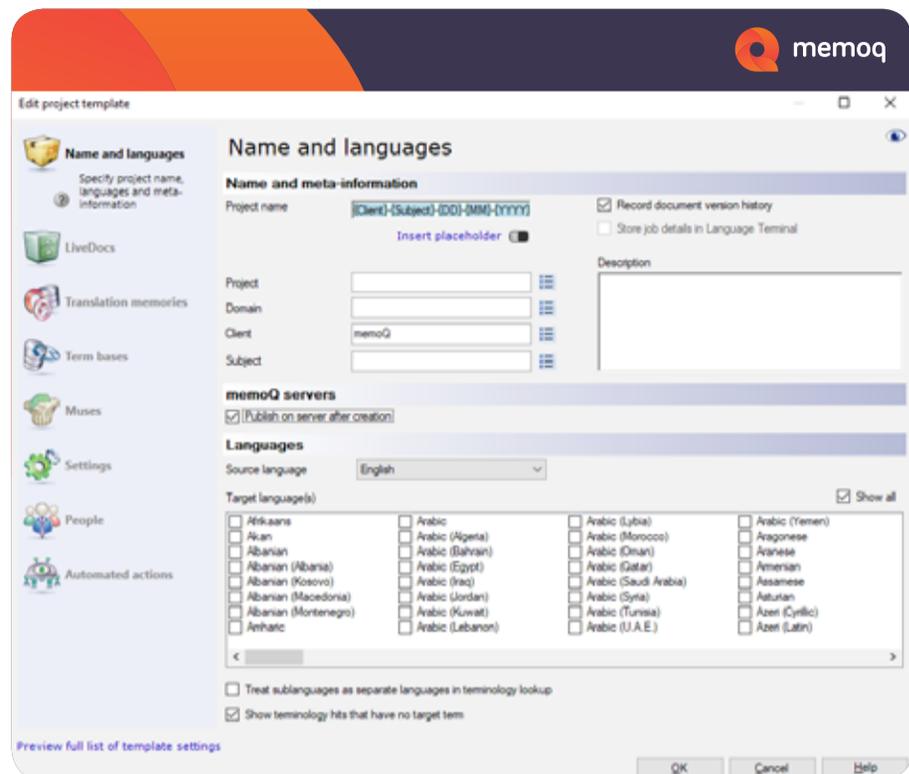
You add a LiveDocs corpus:
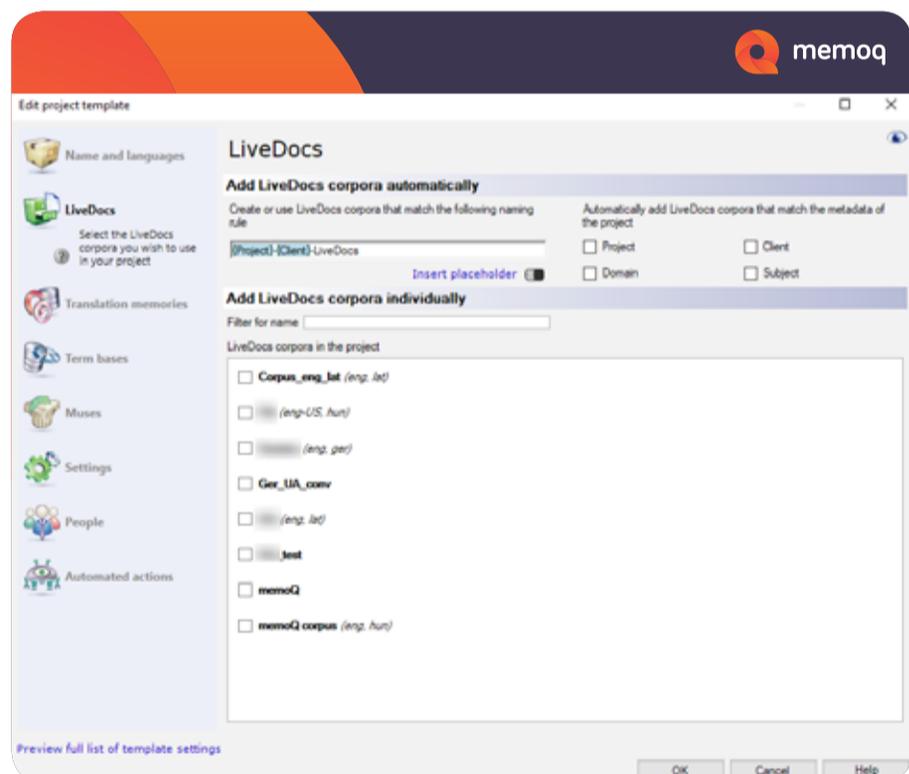
Working and master TM

In memoQ, you need a primary (working) TM where memoQ stores the segments when you confirm them.

But you may also have a master TM where you store all translations once the project is finished and delivered. Your master TM contains the final and approved translations.

If you check out an online project as translator, and the project manager has set the working TM to be the master TM at the same time, you can change this in your local copy of the project. This way, you can confirm translations into your own TM. Nothing changes in the online project, only in your own local copy.

Examples:

Even though you set the master TM as your working TM, you can only write into it if you have direct permissions for it. For example, if you as translator are not a member of any group, you cannot write into a master TM with default permissions. Due to implicit project permissions, PMs have admin rights to the master TM, but everyone else has lookup rights only.

If you change TMs around in your local copy of the project, and then the PM makes changes in the online project, then the next project synchronization overrides your local settings, and applies the PM's latest settings.

memoQ allows you to differentiate between a working and a master TM in your project. In the project templates, configure automated steps for project wrap-up to delete your working TM and also confirm and update segments into your master TM.

In addition to the working and master TMs, you also add a term base, and assign French and German translators to the project.
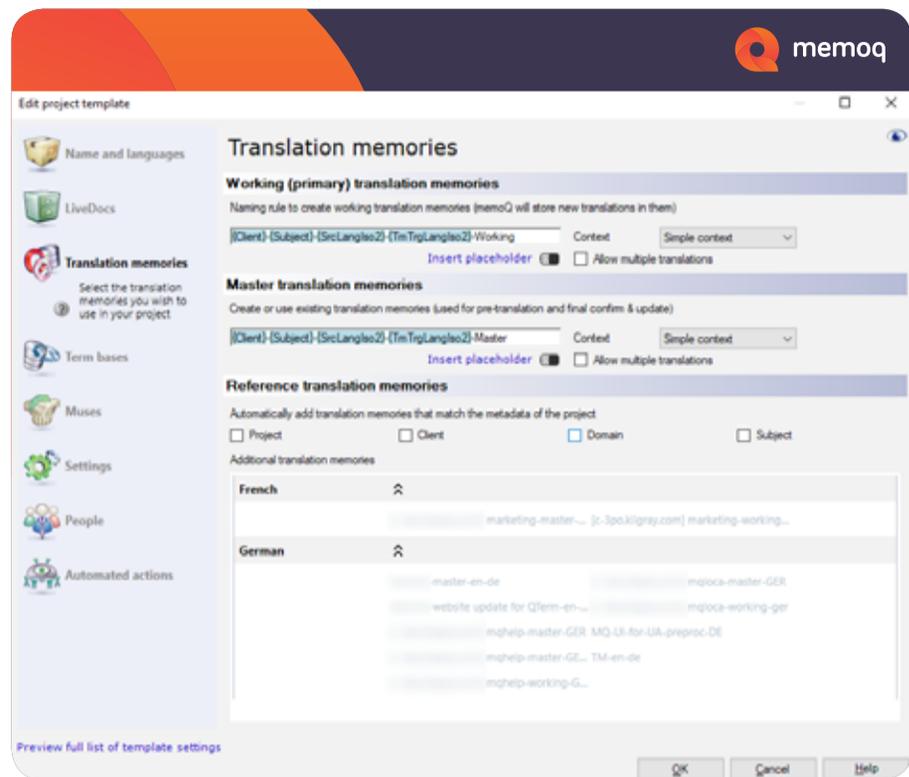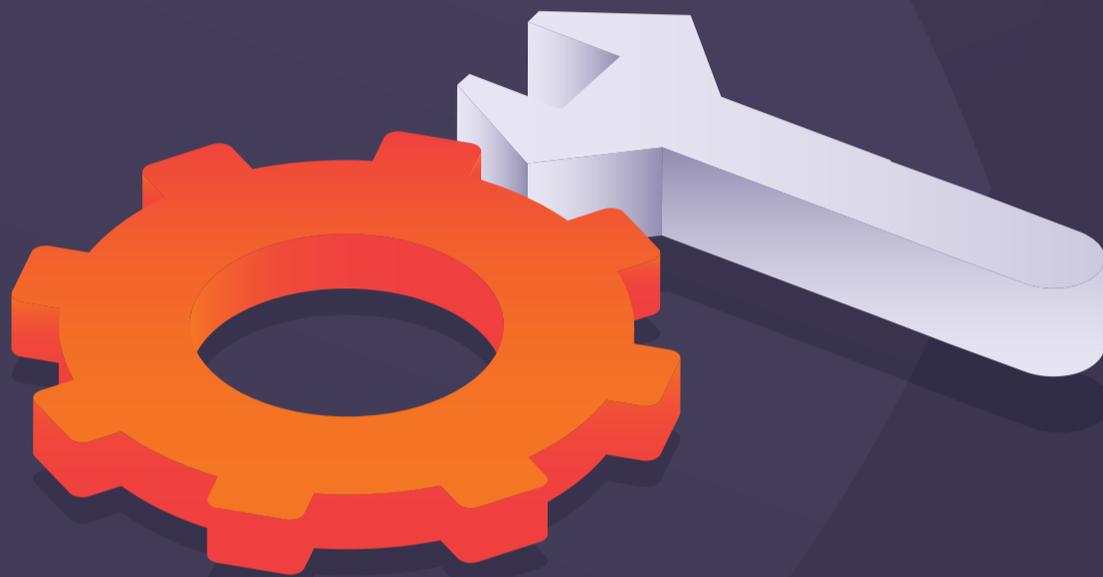
05

Configuring
the automated actions

Configuring the automated actions

You now add actions so that files will be exported automatically.

When the translator delivers the document, you want to export a two-column RTF document which will be used by the client for their review. Select "Translator delivers document" from the list of available triggers, then click the "+" button on the right of the "Actions added to the selected trigger" column:
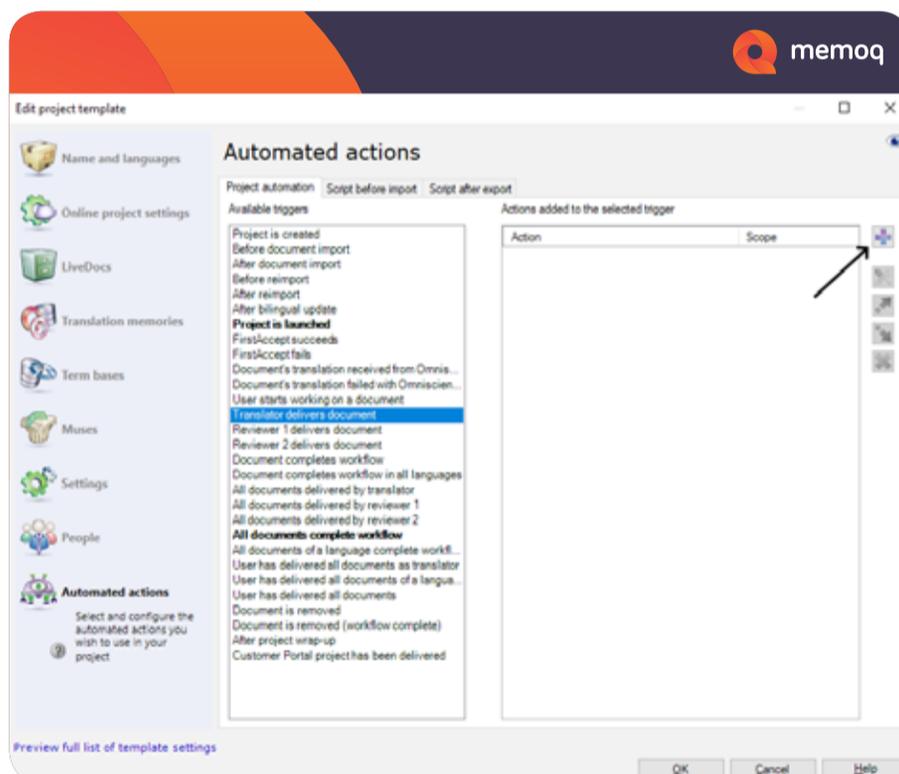
A dialog box opens, showing the list of available actions. Click "Export two-column RTF on server", then click the "Add" button:
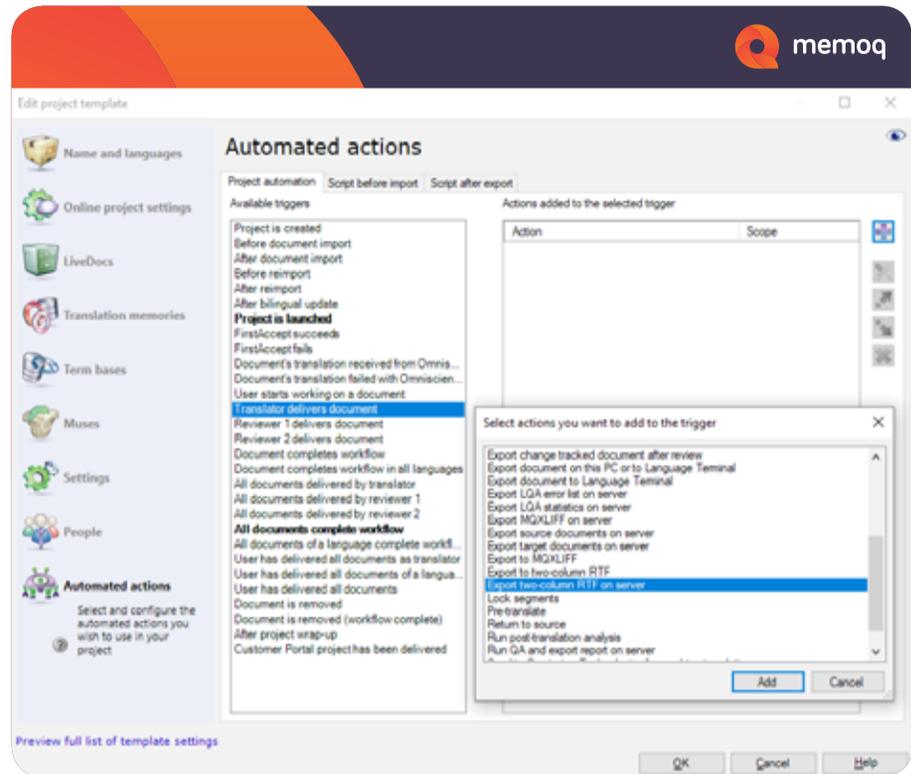
You can now choose how to export the two-column RTF document. For now, just accept the default settings:
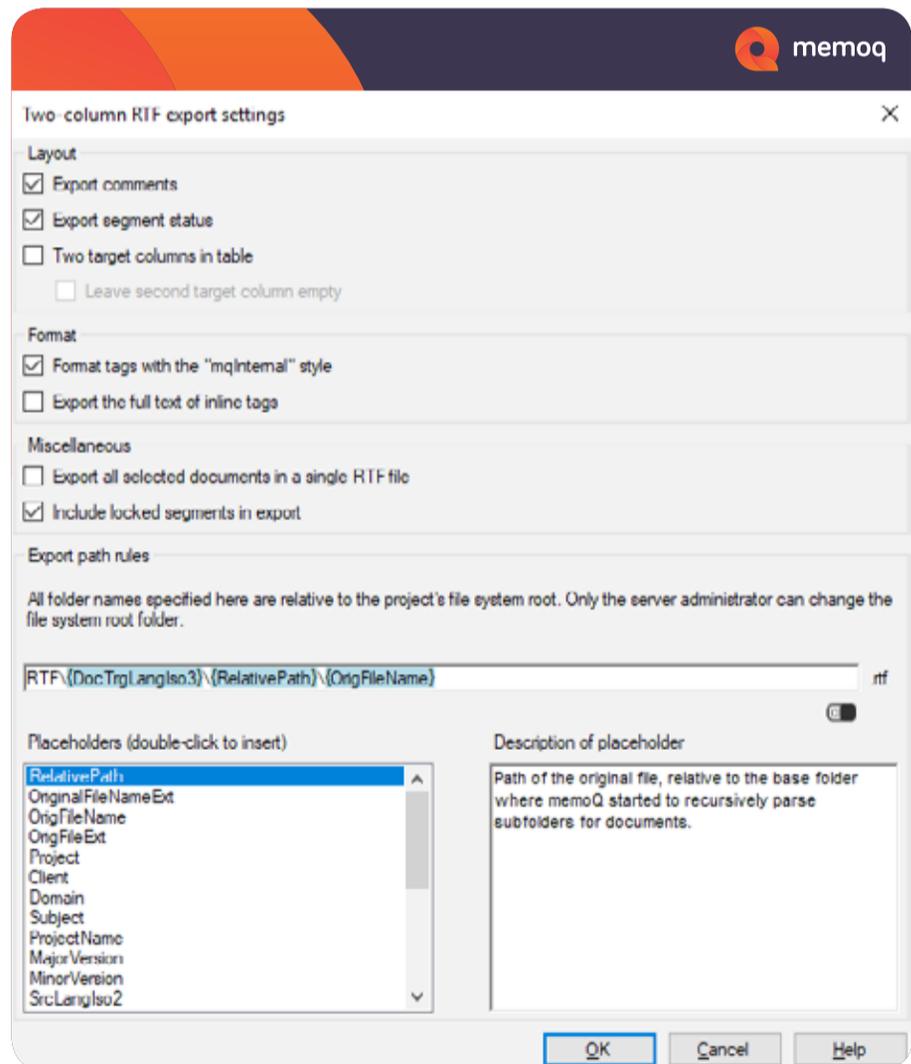
At the end of the process, you want to automatically export the final document. Choose "All documents complete workflow" from the list of triggers, and add the "Export target documents on server" action:
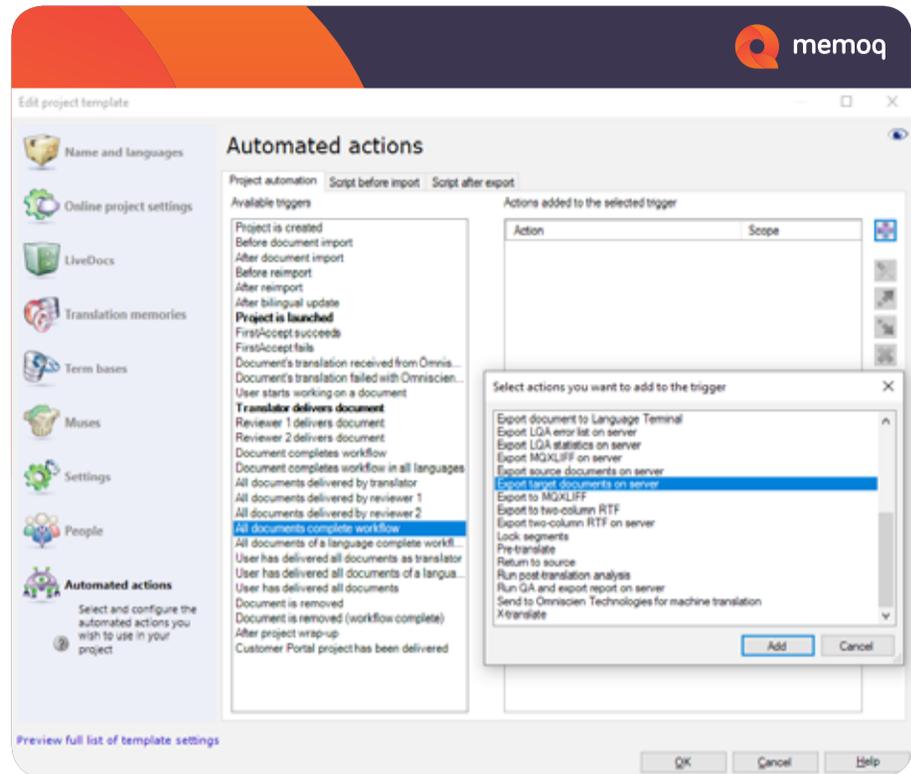
The client also wants the QA report and the translation memories. To export the QA report, choose the trigger "After project wrap-up", and add "Run QA and export report on server":
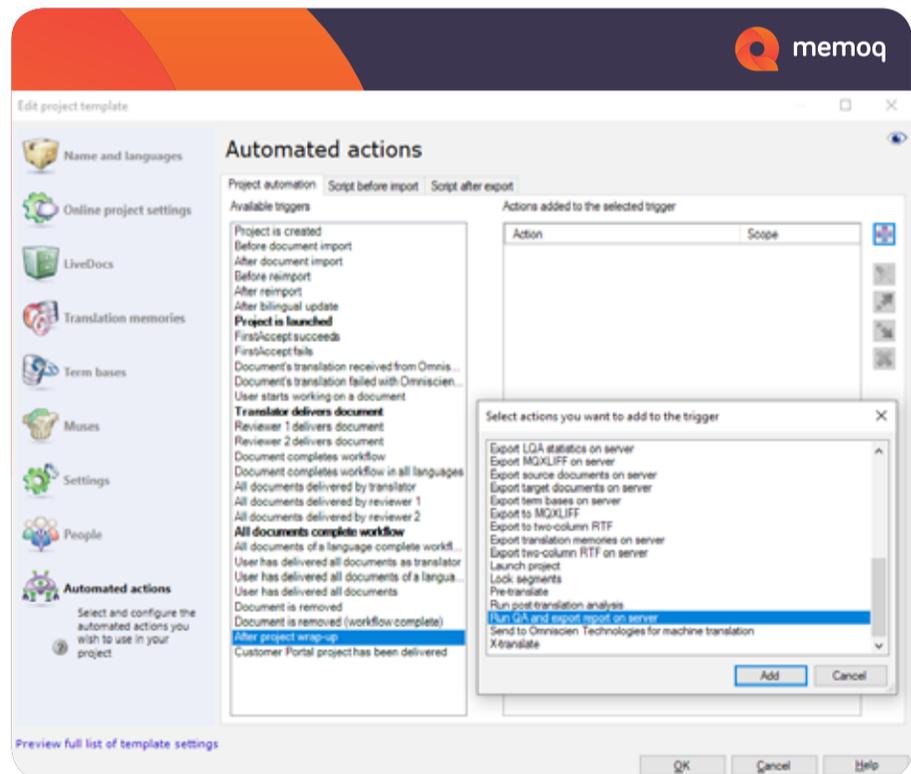
Stick with the default folder names here, too:
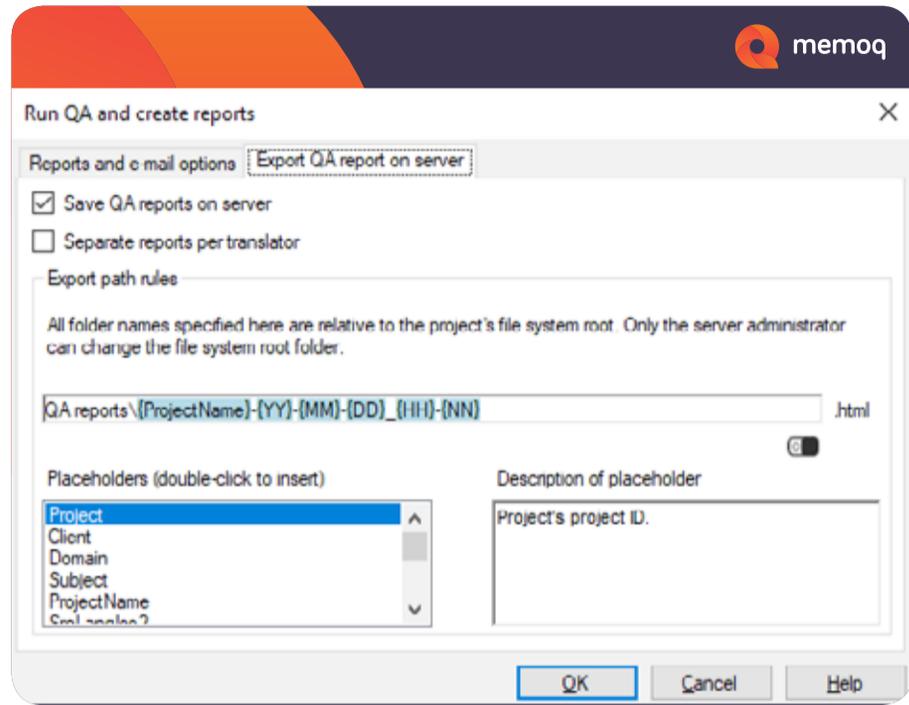
You can also choose QA and email settings here:
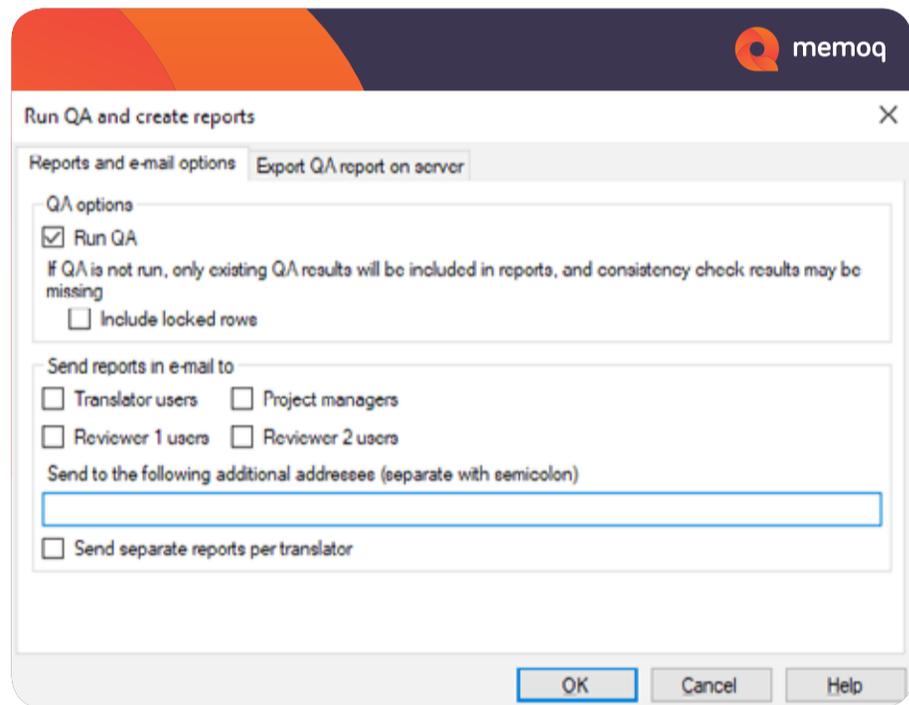
Then choose the trigger "After project wrap-up" again, and add "Export translation memories on server":
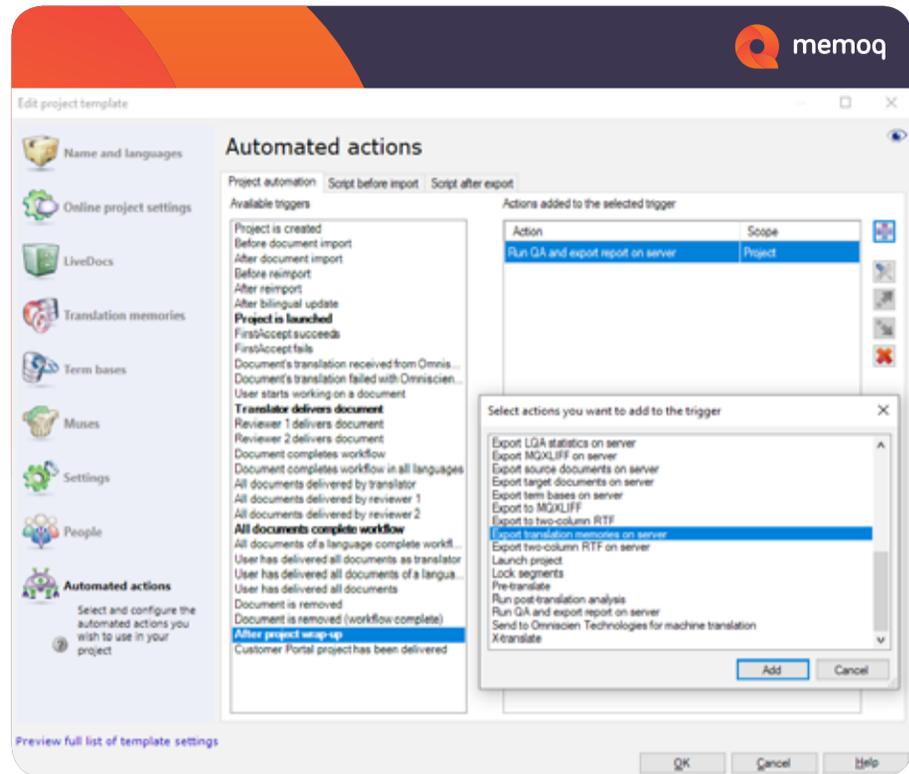
Choose to export only the master translation memories:
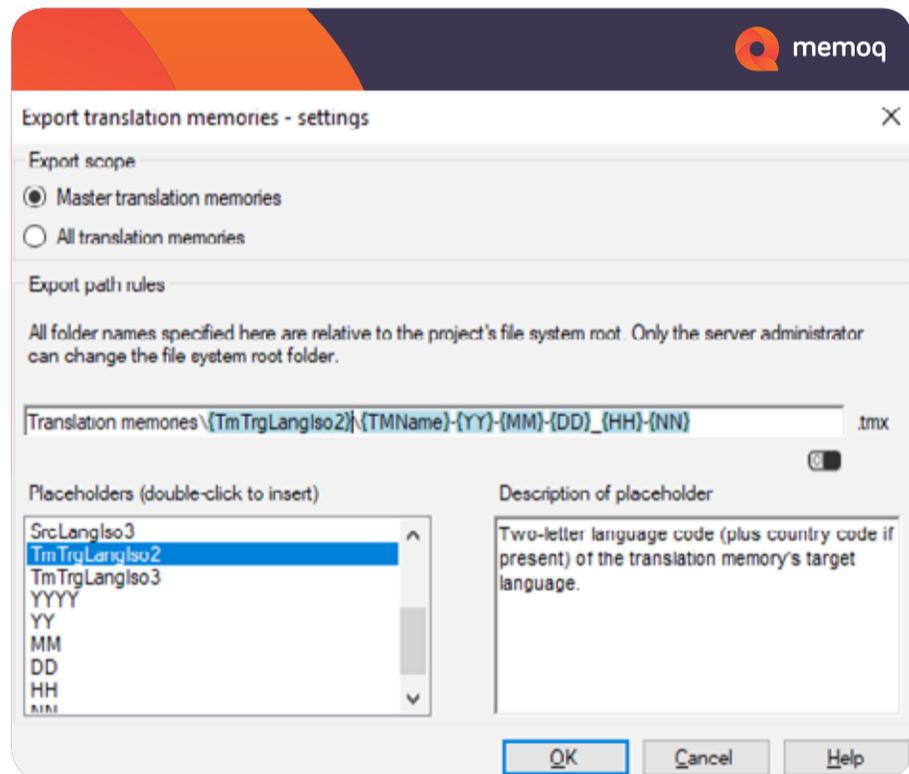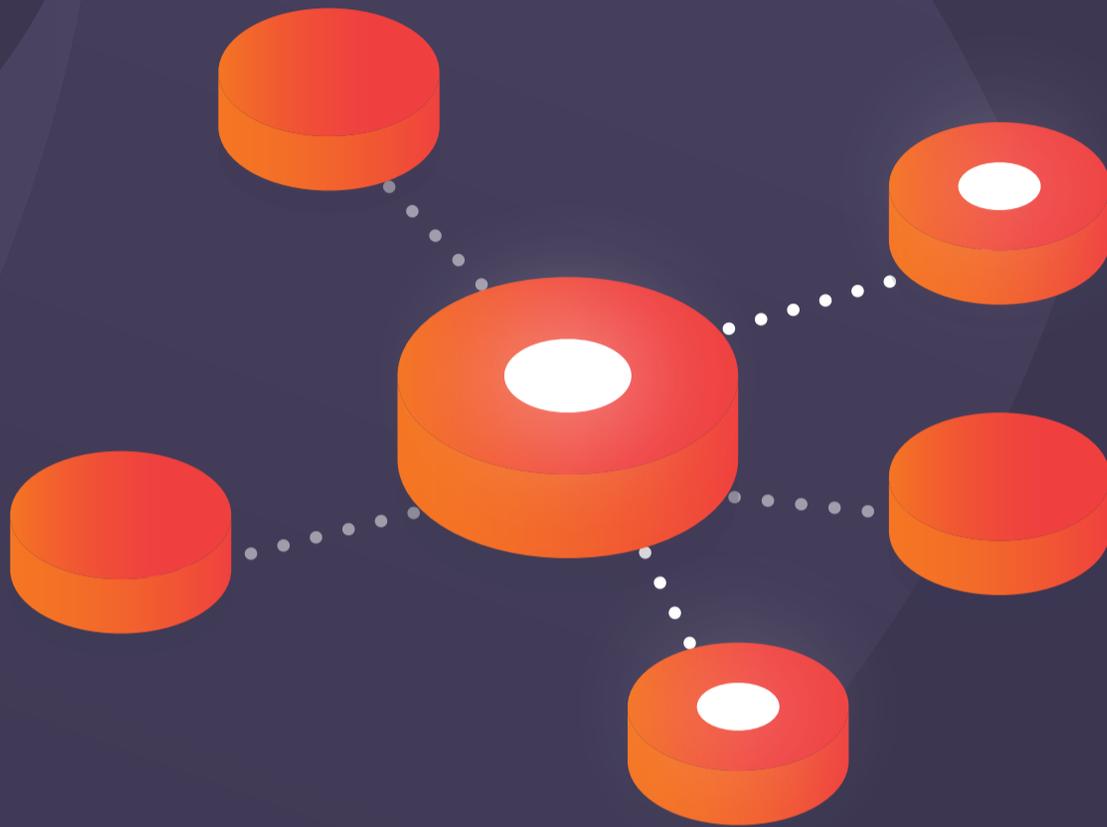
06

Creating a project
from the template

Creating a project from the template

Now the template is ready for use. On the "memoQ" tab, click "New Project", then "New online project from template". Or: Under "Recently used templates", click the template name (if it is there).
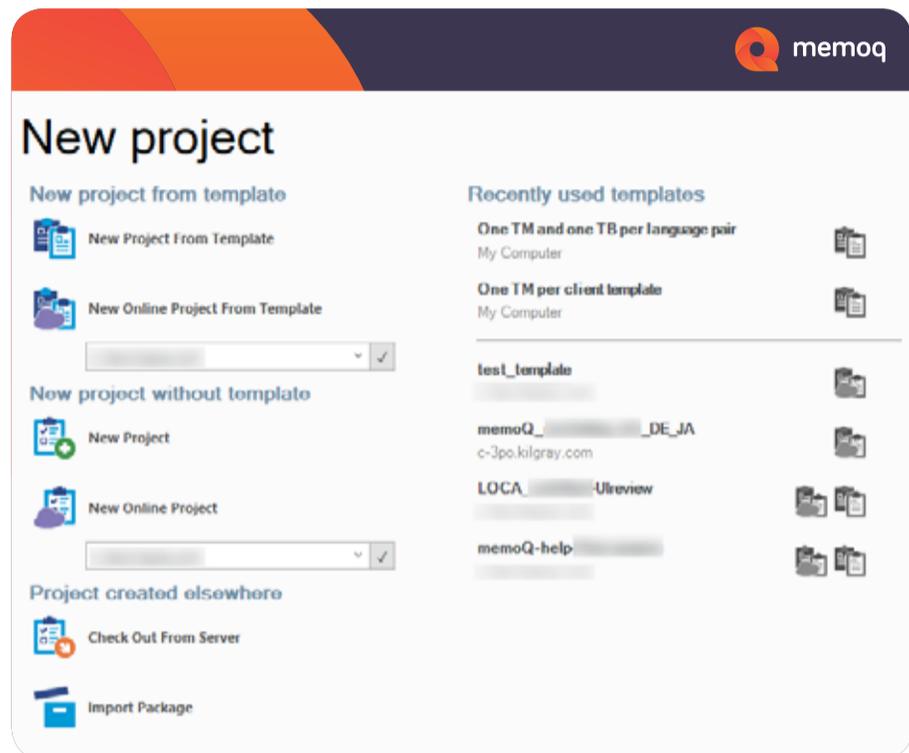
Choose the content source ("Local", "Content connector", or "CMS"). You can add the files now, or leave that step for later. Then click "Next". In this dialog, the name of the client is already there. Add the name of the project and the target languages. Then click "Finish".

The project opens. Add the files if you haven't done so earlier. Assign the translators and reviewers. They can then begin working on the project.

After the translators have delivered their work, memoQ automatically exports a two-column RTF file which can be sent to the client for review.

Changes made in the client review are then entered into the project files, and the review is finished.

At this stage, memoQ exports the translated target documents. After this, open the project, and on the "Translations" tab, click "Wrap up". The project is now complete, the translation memories and QA reports are exported. On the right hand you can see the "Files" tab with all the automatically exported documents.

About memoQ

memoQ Translation Technologies is the developer of memoQ, one of the world's most advanced translation environments. Used by hundreds of enterprises and translation companies all over the world, memoQ is the #1 solution to automate and optimize the entire localization process, and manage translation and localization projects in a time and cost-efficient manner.

Contact us

Do you have any other questions or concerns regarding a CAT tool, a TMS, integrations or else?

Get in touch with us at sales@memoq.com

memoq