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# **]project-open[ v3.0**

## **Translation Freelance Extension User Guide**

Klaus Hofeditz and Frank Bergmann,  
V1.5, 30.8.2005

**INDEX**

<b>1</b>	<b>ABOUT THIS DOCUMENT .....</b>	<b>3</b>
1.1	VERSION.....	3
1.2	SCOPE .....	3
1.3	AUDIENCE.....	3
<b>2</b>	<b>ABOUT THE TRANSLATION FREELANCE EXTENSION.....</b>	<b>4</b>
<b>3</b>	<b>THE FREELANCE DATABASE .....</b>	<b>5</b>
3.1	CREATING A FREELANCE USER.....	5
3.2	MODIFYING FREELANCER'S BASIC DATA .....	6
3.3	MODIFYING "FREELANCE INFORMATION" .....	7
3.4	REPORTING ON RECRUITING INFORMATION.....	7
3.5	MODIFYING FREELANCE "SKILLS" .....	9
3.6	SELECTING FREELANCERS DURING PROJECT STAFFING .....	9
<b>4</b>	<b>FREELANCE INVOICE GENERATION.....</b>	<b>11</b>
4.1	WORKFLOW BASE DATA .....	11
4.2	CREATING A PURCHASE ORDER.....	12
4.3	"FREELANCERS" AND "PROVIDER COMPANIES" .....	14

## 1 About this Document

### *1.1 Version*

Version: 1.5, 30.8.2005

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Status: Preliminary

### *1.2 Scope*

This manual describes how to use the functionality of the **]project-translation[** Freelance Extension.

### *1.3 Audience*

The manual is written for users and project managers. We assume that you have basic computer skills.

## 2 About the Translation Freelance Extension

The **]project-translation[** Freelance Extension allows “Project Managers” and “Freelance Managers” to manage the life cycle of a freelancer and to automate the generation of financial documents for freelancers. The extension consists of three main components:

- **Freelance Recruiting Pipeline:**  
Allows you to manage the recruiting process of freelancers. The database stores information about applications, translation tests and translation test results.
- **Freelance Skill Database:**  
Allows you to manage the profile of each freelancer. The Skill Database records information about the freelancer's source languages, target languages, specialization areas, available computer systems etc. This information is available "at your fingertip" when you staff your project.
- **Freelance Invoice Generation:**  
Allows you to generate purchase orders and invoices for freelancers from information in the translation workflow.

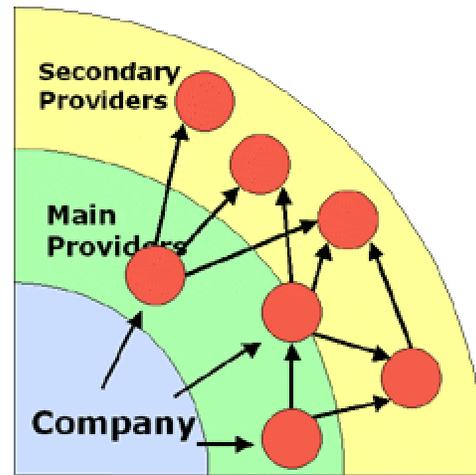


Figure 1: A schematic view to provider relationships in **]project-translation[**

Key benefits of the Freelance Extension include:

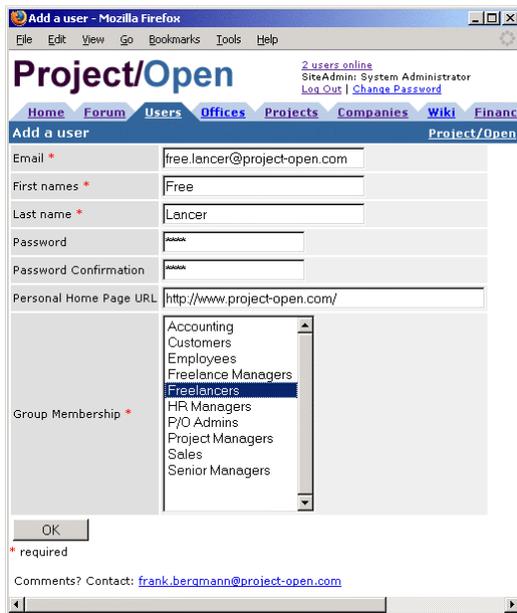
- **Improved Project Staffing Decisions:**  
The integrated “freelance file” allows PMs and Freelance Managers to see all information about a freelancer in one page. This saves time and allows for better decisions when staffing a project.
- **PM and Freelance Manager Efficiency Gains:**  
PMs and Freelance Managers don’t need to “ask around” for the opinion about a particular freelancer. PMs and Freelance Managers have a single place where to look for information about a freelancer.
- **Shared Supplier Database Across Offices:**  
The Freelance Extension provides a particular benefit for company with more than one translation office. The module allows different offices to maintain a single provider database. It provides a unified view to all transaction that the provider had with your company.
- **Management of Knowledge About Freelancers:**  
Information about successful or less successful collaboration with a freelancer is not lost when a PM or a Freelance Manager leaves the company.

### 3 The Freelance Database

The following sections will guide you through the process of creating and modifying the information for a freelancer.

#### 3.1 Creating a Freelance User

The first step to creating a new freelancer is to setup the user using the standard **po** “New User” dialog. Please go to the “Users” tab in the main menu and choose “New User”. This leads you to the “new user dialogue” where you can add the data the new freelancer. Please choose the “Group Membership” as “Freelancers” as the only membership. Freelancers have very little access rights in **project-open**, allowing you to give them access to your system.



**Figure 2: Creating a new freelance user.**  
**No specific freelance information has been entered yet.**

### 3.2 Modifying Freelancer's Basic Data

After creating the freelancer user please choose the Users / Freelancers menu and click on “Free Lancer”. You will see a freelancer file similar to the one below.



**Figure 3: A sample freelancer's file: All information about the freelancer is available in one page.**

Most of the “components” (the gray and blue boxes) on this page are part of the main **[project-translation]** product. However, there are two exceptions:

- **The “Freelance Information” Component:**  
This component contains the freelancer's recruiting status and some information about the bank connection etc.
- **The “Skills” Component:**  
This component allows you to define the skill profile of a freelancer, similar to the profile in

an online job market such as “Monster.com”. The **]project-translation[** Freelance Extension defines a number of “skill types” that have proven useful in a translation agency:

- **TM Tools:**  
Translation Memory Tools such as “Trados 5.0”, “IBM Translation Workbench” etc.
- **LOC Tools:**  
Localization Tools such as “Passolo” or “Catalyst”
- ...

You can customize the skills in this component to the needs of your company. Please see the PO-Configuration-Guide for details on customizing categories.

### 3.3 Modifying “Freelance Information”

The “Freelance Information” component contains information about the global freelance recruiting process and some general information about the freelancer such as the bank connection etc.

These fields are readable by the freelancer but can’t be modified.

Freelance Information	
Recruiting Source	She contacted us
Recruiting Status	Test evaluated
Recruiting Test Type	standard
Recruiting Test Result	A - Test approved
Bank Account	
Bank	
Payment Method	Wire Transfer
Note	
Private Note	
<input type="button" value="Edit"/>	

**Figure 4: A freelancer's "Basic Information"**

The fields in this page are intended to the following meaning:

- **Recruiting Source:**  
”How did we get in contact with this person?”
- **Recruiting Status:**  
One of “Test Send”, “Test Received” and “Test Evaluated”.
- **Recruiting Test Type:**  
Describes the type of test that the freelancer has received (there may be different tests for different types of freelancers).
- **Recruiting Test Result:**  
One of “A – Test Approved”, “B – Not the best” and “C – Test completely false”

Again, you can customize the *values* of these fields to the needs of your company (i.e. add new recruiting status etc.). Please see the PO-Configuration-Guide for details on customizing categories.

### 3.4 Reporting on Recruiting Information

The “Recruiting Status” and “Recruiting Test Result” fields of the freelance “Basic Information” component area available as filters at the upper part of the freelance list page at Users / Freelancers. The values for the selected freelancers are available in the last two columns of the list.

The screenshot shows a web browser window titled "Companies - Mozilla Firefox". The page header includes the "Project/Open" logo and a user status indicator: "1 user online SiteAdmin: System Administrator Log Out | Change Password". A navigation menu contains links for Home, Forum, Users, Offices, Projects, Companies, Wiki, Finance, Help, and Admin. The main content area is titled "Users in group 'Freelancers'" and includes a "Filter Freelancers" section with two dropdown menus: "Recruiting Status:" (set to "All") and "Recruiting Test Result:" (set to "All"), with a "Go" button below them. Below the filter is a secondary navigation menu with tabs for Employees, Customers, Freelancers (selected), Unassigned, and All Users. A letter index "All a b c d e f g h i j k l m n o p q r s t u v w x y z" is provided for navigation. The main data is presented in a table with the following columns: Name, Email, Work Phone, Cell Phone, Home Phone, Recr Status, and Recr Test.

Name	Email	Work Phone	Cell Phone	Home Phone	Recr Status	Recr Test
Draco Draculevich	<a href="mailto:va.hels@project-open.com">va.hels@project-open.com</a>		+44 1234560	+44 1234560	Test evaluated	A - Test approved
Angelique Picard	<a href="mailto:apicard@wanadoo.fr">apicard@wanadoo.fr</a>	+33 594 87 49 92		+33 778 472 390	Test evaluated	A - Test approved
Daniel Daminfast	<a href="mailto:daniel_df@gmx.de">daniel_df@gmx.de</a>			+49 30 69 51 56 85		A - Test approved
Rachel Cartus	<a href="mailto:rachel_cartus@mail.com">rachel_cartus@mail.com</a>	+44 573 065 2743	+43 865 897 2020	+39 855 728 0128	Test received	
Eva Montague	<a href="mailto:eva_montague@tigerpond.com">eva_montague@tigerpond.com</a>	+351 366 048 1968	+1 963 735 3578	+54 585 968 4003		
Mike Rock	<a href="mailto:mike_rock@project-open.com">mike_rock@project-open.com</a>	+33 231 001 5378	+44 462 738 5087	+49 617 127 3631	Test evaluated	C - Test completely failed
Paula Said	<a href="mailto:paula_said@tigerpond.com">paula_said@tigerpond.com</a>	+56 517 474 5359	+33 951 832 4073	+39 347 103 7130		

**Figure 5: The “Freelance List Page”:**  
Drop-down boxes allow you to look for freelancers with a particular status

### 3.5 Modifying Freelance "Skills"

#### 3.5.1 The Skill Component

The freelance "Skills" component defines several "Skill Types" that consist of a number of "Skills".

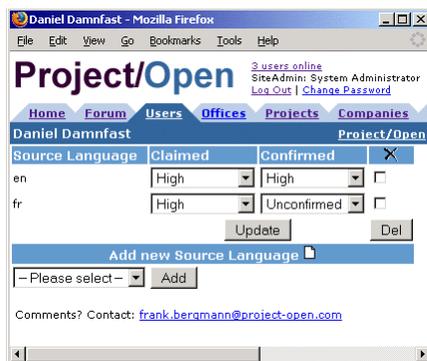
Skills											
TM Tools		LOC Tools		Operating System		Source Language		Target Language		Subjects	
Skill	Claim	Skill	Claim	Skill	Claim	Skill	Claim	Skill	Claim	Skill	Claim
Star Transit 3.0	High			Windows XP	Medium ✓	fr	High	de_DE	High ✓	Law	High ✓
Trados 5.0 Freelance	High					en	High ✓			Mkt	High
										Tec	Medium
										Biz	High ✓

**Figure 6: The freelancer claims that he is capable of translating from the "Source Languages" French (fr) and English (en) into the "Target Language" of German/Germany (de\_DE). The English source language skill is confirmed.**

The example above shows an example configuration of a real-world case with several Skill Types (Source Language, Target Language...) and several Skills per Skill Type (such as English or "Trados 5.0 Freelance"). Each Skill can be valuated as "high", "medium" and "low".

#### 3.5.2 Confirmed and Unconfirmed Skills

You may already have noted the "ticks" (✓) behind some of the skills in the figure above. These ticks indicate that a "claimed" skill has been "confirmed". The idea behind "claimed" and "confirmed" skills is a separation of work between a freelancer and the "Freelance Manager" at your company: The freelancer can edit his skills himself and add new ones. However, only members of your company (the "Freelance Managers") can "confirm" a skill. The following screen shows an example:



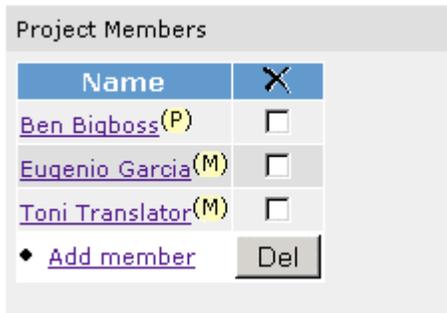
**Figure 7: Skills Edit Screen: English has been confirmed, while French is still pending**

You can see that the "en" (English) "Source Language" skill has been confirmed as "high", while the "fr" (French) has skill has not yet been confirmed.

### 3.6 Selecting Freelancers During Project Staffing

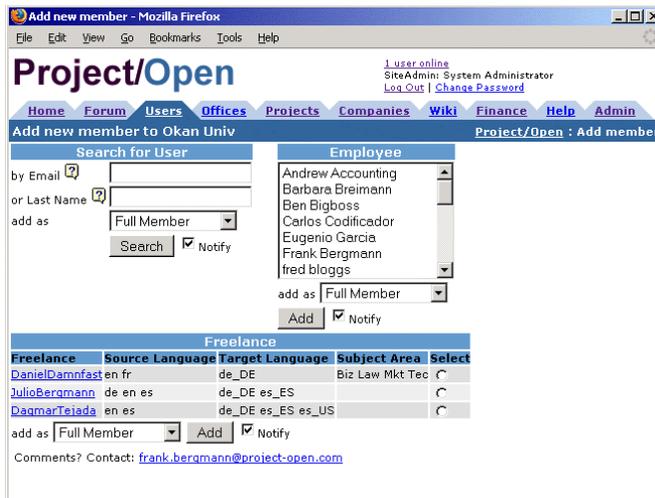
The **project-translation** Freelance Extension allows you to use the freelance skill database during the staffing phase of your project: Please go to of a project, set the source and target

language of the project to “en” and “de\_DE” and select the “Add member” link in the “Project Members” component (see below).



**Figure 8: Adding a new user to a project**

After clicking on “Add member” you will see the usual “Add Member” dialog. This dialog now contains a third “Freelance” option in the lower part. This option lists all freelancers that comply with the source and target language of your project. (The “Freelance” list will be empty if there is no freelancer matching this condition.)



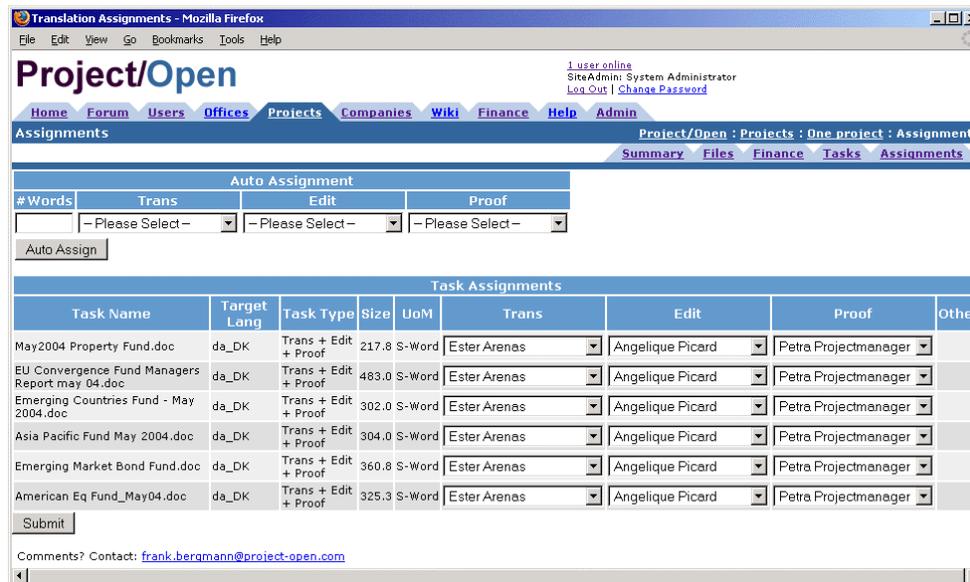
**Figure 9: An "Add Member" dialog showing the list of freelancers who are matching the project's language combination.**

## 4 Freelance Invoice Generation

The Freelance Invoice Generation provides a “Wizard” similar to the “Translation Purchase Order Wizard” (please see the “[po]-Finance-User-Guide”). The wizard allows you to generate Purchase Orders and Provider Invoices from project assignment information already present in the “Translation Workflow” (please see the “[po]-Trans-Workflow-User-Guide”).

### 4.1 Workflow Base Data

The “Freelance Invoice Wizard” assumes that you have setup a project and assigned several tasks to freelancers. The figure below shows the setup of a project that we are going to use as an example in this chapter.



The screenshot shows the 'Project/Open' web application interface. At the top, there is a navigation menu with options like Home, Forum, Users, Offices, Projects, Companies, Wiki, Finance, Help, and Admin. Below this, there is a breadcrumb trail: 'Project/Open : Projects : One project : Assignments'. The main content area is titled 'Assignments' and contains an 'Auto Assignment' section with dropdown menus for '# Words', 'Trans', 'Edit', and 'Proof', and an 'Auto Assign' button. Below this is a 'Task Assignments' table with columns for Task Name, Target Lang, Task Type, Size, UoM, Trans, Edit, Proof, and Other. The table lists several tasks with their respective details and assigned users.

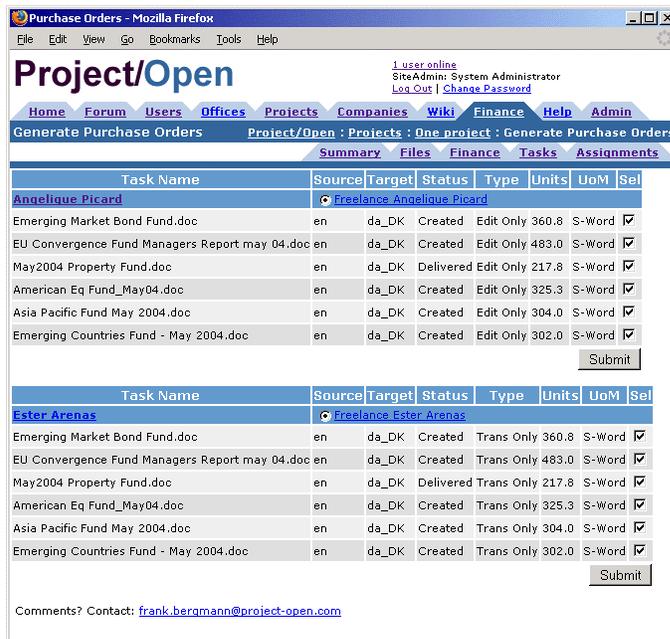
Task Name	Target Lang	Task Type	Size	UoM	Trans	Edit	Proof	Other
May2004 Property Fund.doc	da_DK	Trans + Edit + Proof	217.8	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	
EU Convergence Fund Managers Report may 04.doc	da_DK	Trans + Edit + Proof	483.0	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	
Emerging Countries Fund - May 2004.doc	da_DK	Trans + Edit + Proof	302.0	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	
Asia Pacific Fund May 2004.doc	da_DK	Trans + Edit + Proof	304.0	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	
Emerging Market Bond Fund.doc	da_DK	Trans + Edit + Proof	360.8	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	
American Eq Fund_May04.doc	da_DK	Trans + Edit + Proof	325.3	S-Word	Ester Arenas	Angelique Picard	Petra Projectmanager	

Figure 10: A sample project with translation task assignments

## 4.2 Creating a Purchase Order

Please go to the “Finance” tab of the sample project and select the “New Purchase Order from Translation Tasks” or “New Provider Invoice from Translation Tasks” link (both are working in the same way). Also, you can use the same link from the “Finance” main menu.

As a result you will see the “Task Select” page of the “Freelance Invoicing Wizard” which lets you select different tasks to be sent to the freelancer:



The screenshot shows the 'Task Select' page in the Project/Open application. The browser window title is 'Purchase Orders - Mozilla Firefox'. The page header includes the Project/Open logo and navigation links like Home, Forum, Users, Offices, Projects, Companies, Wiki, Finance, Help, Admin. The main content area displays two tables of tasks for selection, each with a 'Submit' button at the bottom.

Task Name	Source	Target	Status	Type	Units	UoM	Sel
<b>Freelance Angelique Picard</b>							
Emerging Market Bond Fund.doc	en	da_DK	Created	Edit Only	360.8	S-Word	<input checked="" type="checkbox"/>
EU Convergence Fund Managers Report may 04.doc	en	da_DK	Created	Edit Only	483.0	S-Word	<input checked="" type="checkbox"/>
May2004 Property Fund.doc	en	da_DK	Delivered	Edit Only	217.8	S-Word	<input checked="" type="checkbox"/>
American Eq Fund_May04.doc	en	da_DK	Created	Edit Only	325.3	S-Word	<input checked="" type="checkbox"/>
Asia Pacific Fund May 2004.doc	en	da_DK	Created	Edit Only	304.0	S-Word	<input checked="" type="checkbox"/>
Emerging Countries Fund - May 2004.doc	en	da_DK	Created	Edit Only	302.0	S-Word	<input checked="" type="checkbox"/>
<input type="button" value="Submit"/>							

Task Name	Source	Target	Status	Type	Units	UoM	Sel
<b>Freelance Ester Arenas</b>							
Emerging Market Bond Fund.doc	en	da_DK	Created	Trans Only	360.8	S-Word	<input checked="" type="checkbox"/>
EU Convergence Fund Managers Report may 04.doc	en	da_DK	Created	Trans Only	483.0	S-Word	<input checked="" type="checkbox"/>
May2004 Property Fund.doc	en	da_DK	Delivered	Trans Only	217.8	S-Word	<input checked="" type="checkbox"/>
American Eq Fund_May04.doc	en	da_DK	Created	Trans Only	325.3	S-Word	<input checked="" type="checkbox"/>
Asia Pacific Fund May 2004.doc	en	da_DK	Created	Trans Only	304.0	S-Word	<input checked="" type="checkbox"/>
Emerging Countries Fund - May 2004.doc	en	da_DK	Created	Trans Only	302.0	S-Word	<input checked="" type="checkbox"/>
<input type="button" value="Submit"/>							

Comments? Contact: [frank.bergmann@project-open.com](mailto:frank.bergmann@project-open.com)

**Figure 11: The “Task Select” page allows you to select the tasks to be included in a Purchase Order**

Please note the selected “Freelance Angelique Picard” and “Freelance Ester Arenas” links. These are the “companies” (i.e. legal entities) associated with the “persons” Angelique Picard and Ester Arenas”. We are going to explain the difference more in detail further below.

Clicking on one of the “Submit” buttons will lead you to the next “Proposal” screen.

**Purchase Order Data**

Purchase Order nr.: 2005\_05\_0046  
 Purchase Order date: 2005-05-15  
 Payment terms: 60 days date of invoice  
 Payment Method: Undefined  
 Purchase Order template: po-spanish.adp  
 Type: Purchase Order

**Recipient**

Company name: Freelance Angelique Picard  
 VAT:  
 Accounting Contact: Angelique Picard  
 Address: 198 Promenade des Americaine  
 Zip: 06010  
 Country: France  
 Phone: +33 594 87 49 92  
 Fax:  
 Email: apicard@wanadoo.fr

Task Name	Src	Trg	XTr	Rep	100%	95%	85%	75%	50%	0%	Units	Type	
<b>2005_0011: Roll Out Danish Translation</b>													
Emerging Market Bond Fund.doc	en	da_DK	0	0	11	0	0	0	0	0	358	0.369 Hour	Edit Only
EU Convergence Fund Managers Report may 04.doc	en	da_DK	0	0	12	0	0	0	0	0	480	0.492 Hour	Edit Only
May2004 Property Fund.doc	en	da_DK	0	0	57	0	19	0	0	0	194	0.270 Hour	Edit Only
American Eq Fund_May04.doc	en	da_DK	0	0	37	50	0	0	0	0	301	0.388 Hour	Edit Only
Asia Pacific Fund May 2004.doc	en	da_DK	0	0	0	0	6	11	0	0	290	0.307 Hour	Edit Only
Emerging Countries Fund - May 2004.doc	en	da_DK	0	0	0	0	6	0	0	0	299	0.305 Hour	Edit Only

Order	Description	Units	UoM	Rate
2005_0011:				
1	Edit Only (da_DK)	2,131	Hour	25,000 EUR

VAT: 0 %  
 TAX: 0 %  
 Create Purchase Order

Company	UoM	Task Type	Target	Source	Subject Area	Price
<b>2005_0011:</b>						
freelance_8811	Hour					25,000 EUR
internal	Hour					50,000 EUR

Comments? Contact: frank.bergmann@project-open.com

**Figure 12: The “Proposal” screen shows a Purchase Order proposal generated by the wizard.**

This “Proposal” screen shows you the purchase order as generated using the system defaults. This page joins information from several sources and takes specific assumptions:

- The total word count of the .doc files is calculated based on the provider’s Trados matrix. You can edit the Trados matrix in the provider company page.
- The editing time (0.369 Hour in the “Emerging Market Bond Fund.doc” line) is calculated using an average performance of 1000 editing words per hour. This performance is defined as a system “Parameter”. Please see the “PO-Configuration-Guide” on how to change such parameters.
- The hourly price for the freelancer is taken from the provider’s price list (Freelance Angelique Picard). Please see the “PO-Finance-User-Guide” for details on the price list mechanism.

You can now modify both the “Units” and the “Rate” fields and create the final document by pressing the “Create Purchase Order” button.

### 4.3 "Freelancers" and "Provider Companies"

One issue of the "Invoicing Wizard" is the association between a freelancer (a person) and a provider (a company) because freelancers may potentially belong to more than one company at different moments of time. Also, there are cases where several freelancers have founded a small company together with a single billing address.

The "Invoicing Wizard" deals with these issues by offering you all provider companies that contain the freelancer "person" as a member.

Task Name	Source	Target	Status	Type	Units	UoM	Sel
<b>Angelique Picard</b> <input checked="" type="radio"/> Freelance Angelique Picard <input checked="" type="radio"/> Freelance Karen Aspero							
Emerging Market Bond Fund.doc	en	da_DK	Created	Edit Only	360.8	S-Word	<input checked="" type="checkbox"/>
EU Convergence Fund Managers Report may 04.doc	en	da_DK	Created	Edit Only	483.0	S-Word	<input checked="" type="checkbox"/>
May2004 Property Fund.doc	en	da_DK	Delivered	Edit Only	217.8	S-Word	<input checked="" type="checkbox"/>
American Eq Fund_May04.doc	en	da_DK	Created	Edit Only	325.3	S-Word	<input checked="" type="checkbox"/>
Asia Pacific Fund May 2004.doc	en	da_DK	Created	Edit Only	304.0	S-Word	<input checked="" type="checkbox"/>
Emerging Countries Fund - May 2004.doc	en	da_DK	Created	Edit Only	302.0	S-Word	<input checked="" type="checkbox"/>
Submit							

**Figure 13: Angelique Picard is a member of more than one provider company**

The figure above shows the situation if Angelique is a member of more than one company (let's assume that she has set up a company together with her friend Karen Aspero).

Finally, there is the case that the freelancer "Person" is not member of any company yet.

Task Name	Source	Target	Status	Type	Units	UoM	Sel
<b>Angelique Picard</b> No company found Create a new company for this freelancer							
Emerging Market Bond Fund.doc	en	da_DK	Created	Edit Only	360.8	S-Word	<input checked="" type="checkbox"/>
EU Convergence Fund Managers Report may 04.doc	en	da_DK	Created	Edit Only	483.0	S-Word	<input checked="" type="checkbox"/>
May2004 Property Fund.doc	en	da_DK	Delivered	Edit Only	217.8	S-Word	<input checked="" type="checkbox"/>
American Eq Fund_May04.doc	en	da_DK	Created	Edit Only	325.3	S-Word	<input checked="" type="checkbox"/>
Asia Pacific Fund May 2004.doc	en	da_DK	Created	Edit Only	304.0	S-Word	<input checked="" type="checkbox"/>
Emerging Countries Fund - May 2004.doc	en	da_DK	Created	Edit Only	302.0	S-Word	<input checked="" type="checkbox"/>
Submit							

**Figure 14: The "Task Select" page if Angelique Picard is not yet member of a company**

The figure above shows this case. In this case the wizard offers you to "Create a new company for this freelancer".

The screenshot shows a web browser window titled 'Edit Company - Mozilla Firefox' with the URL 'http://ptdemo/intranet/companies/new?compa'. The page header includes the 'Project/Open' logo and navigation links: Home, Forum, Users, Offices, Projects, Companies, Wiki, Finance, Help, Admin. The main content area is titled 'Add New Company' and contains the following form fields:

- Company Name: Freelance Angelique Picard
- Company Short Name (directory path): freelance\_8811
- Referral Source: (empty)
- Company Status: Active
- Company Type: Freelance Provider
- Phone: +33 594 87 49 92
- Fax: (empty)
- Address 1: 198 Promenade des très très bell
- Address 2: (empty)
- ZIP and City: 06010 Nice
- Country: France
- Web Site: (empty)
- VAT Number: (empty)
- (Expected) Annual Revenue: EUR 0-1k
- Is this a billable company?: No (selected)
- Key Account Manager: (dropdown menu open showing: Goo Ber, Harv Harvy, Ichiar Rodriguez Romero, Jens Projectmanager, Larry Littleboss, Laura Languagelead, Pedro Prueba, Petra Projectmanager)

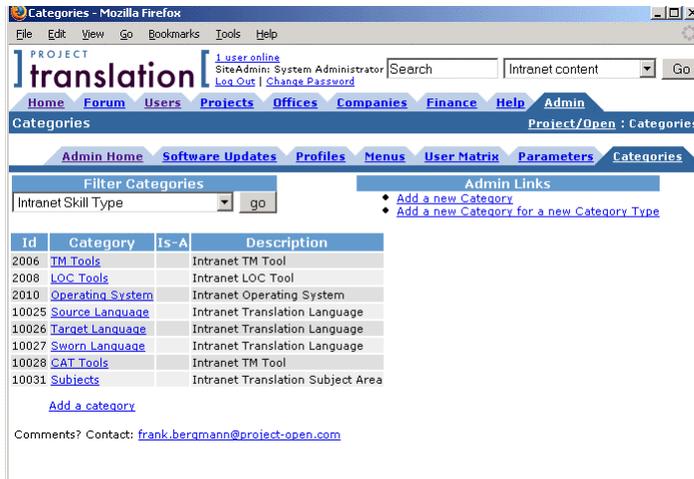
**Figure 15: A proposal for a new freelance company for Angelique Picard**

Clicking on this link will show you the figure above, which allows you to create a new “Provider Company” for the freelance.

After creating the freelance provider you probably want to edit the new company to define the provider’s price list (please see the “[[project-open](#)] -Finance-User-Guide”) and to set the provider’s Trados matrix.

## 5 Administration of Freelance Skills

Freelance skills can be customized using the “categories” maintenance page as explained in detail in the PO-Configuration-Guide.



**Figure 16: Freelance Skill Categories Maintenance**

The figure above shows the “Intranet Skill Types” category. This category defines the main types of skills of a freelancer. One “skill box” appears in the “Freelance Skill Component” (see above). The “Description” field of these skills defines the category for the values in each of the skill types. For example, “Intranet TM Tool” is the category for the “TM Tools” skill type. Please select “Intranet TM Tool” if you want to add skills to this skill type.

Please make sure that the “Description” and the name of the skill types coincide.

# PROJECT ]open[

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