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## **XTRF-TM – Managing teamwork**

### **ABSTRACT**

In order to be able to meet the above requirements, translation and localisation services providers must use a system which automates repetitive actions and introduces a number of improvements that speed up day-to-day operations. In turn, to facilitate communication among all stakeholders in the translation project, such as customers, translation agencies and contractors, their interaction should be based on a single platform which enables all stakeholders to have access to essential information, and which limits communication flows outside the centralised system.

This is exactly the role the XTRF-TM system plays. It is the first fully web-based and complete set of tools for translation agencies and corporate translation departments.

The outline of the system, under the working name TROFFI, was presented at the ASLIB 2005 conference. Ever since, the system has been rapidly developing, to reach its today's fully-fledged form, which comprises all material aspects of the process, such as:

- business processes management;
- production process, workflow and file management;
- web-based translation environment management (CAT tool provided by XTM Intl, of London, UK);
- management of the access portal for customers and subcontractors.

Today, XTRF-TM represents the central element of the translation agency, or the corporate translation department, by collecting data from every operational area and making them available to all stakeholders in the format best suited to their needs. Thus, XTRF-TM can be looked at as global, integrated working environment, and an on-line collaboration platform..

### **XTRF-TM – essential information**

Continuous optimisation of supply chain and business processes pertaining to all areas of corporate operations translates into specific requirements to be met by providers of translation services.

The employment of Computer-Assisted Translation (CAT) tools has become a standard already, and yet the market still awaits new improvements. In terms of the very translation process, the topical issue now is the Machine Translation (MT), although material changes are also taking place with respect to the management of translation projects and the related processes.

Similarly to requirements in place for other industries, translation providers are expected to:

- speedily respond to inquiries;
- offer a broad range of associated services (such as DTP, MT, post-editing, copywriting, transcreation, abstracting, brand names consultancy, localisation, engineering, to name but a few);
- ensure short turnaround times;
- control costs and maintain cost efficiency.

In order to be able to meet the above requirements, translation and localisation services providers must use a system which automates repetitive actions and introduces a number of improvements that speed up day-to-day operations. In turn, to facilitate communication among all stakeholders in the translation project, such as customers, translation agencies and contractors, their interaction should be based on a single platform which enables all stakeholders to have access to essential information, and which limits communication flows outside the centralised system.

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### **XTRF-TM as an online collaboration platform**

Now, let us have a look at what the project delivery looks like on the XTRF-TM platform.

Let us assume that we have already defined a customer in the XTRF-TM system, including detailed rates, and that the customer is authorised to access the XTRF partner portal.

The customer logs in to the XTRF portal and creates a request for quotation. To do so, the customer defines language combinations, the project type and workflow, and then uploads source files. The XTRF performs the initial calculation of the number of words to be translated, combines the data with the rates defined for the customer for the indicated language combinations, and finally provides an estimated project value.

Based on the calculation, the customer may decide to send all the above information to the translation agency requesting a precise project quotation.

The initially provided information, including all data and files entered or uploaded by the customer, is immediately available to the project manager, who can assess the project to identify any difficulties and, after processing of the files, if necessary, obtain a precise project analysis from the integrated CAT tool. Having gone through all the necessary project stages and having entered the resultant data into the system, the project manager may send the final quotation to the customer.

Following the customer's acceptance of the quote, the project manager converts the quotation into a project, while keeping all the data and arrangements previously entered into the system.

The XTRF creates a predefined set of project folders on the server, decides on the sequence of actions to be done under the project, and copies source files.

Subcontractor for the project can be selected in two ways. The basic way is to select e.g. a translator from the list of subcontractors who meet specific criteria. The other and more sophisticated way is to send to the selected subcontractors information on the project to be executed, to let them report readiness to accept the assignment. Depending on the settings, the subcontractor who reports first is selected, or the person selected by the project manager from among the subcontractors who reported their readiness for the assignment.

After selecting all subcontractors for the project, it is possible to automatically launch the workflow for all the project's language combinations. This means that, immediately and automatically:

- the project is created in the CAT tool used for web browser-based translation/revision/editing;
- the selected subcontractor is authorised in the system to complete the assignment in XTM;
- the selected subcontractors are notified by e-mail of the job waiting for completion in the XTM, along with a direct link to the project file, created as an assignment in the XTM tool;
- the assignment status is changed to "started".

The link sent to the subcontractor in the e-mail redirects him/her to the webpage where the file for translation/revision/editing in the XTM is available. All activities covered by the assignment, including quality control, are performed by the subcontractor online. This means that no software has to be installed. The subcontractor can therefore begin working on the assignment in the defined web-based environment.

On completion of the assignment, the translator reports, through the portal, or using a link in the e-mail, the completion of the job, which automatically triggers the following sequence of actions:

- status of a given workflow step is changed into "ready", as a result of which the translator no longer has access to a given file;
- the project manager is notified of a workflow step's completion;
- the completed file is made available for processing in the subsequent workflow step (if the subsequent step is performed in the XTM, the files are made available as an on-line XTM project);
- another subcontractor is notified by e-mail of the job waiting for completion in the XTM, along with a direct link to the project file, or the file is made available as an assignment created in the XTM tool.

Importantly, each subcontractor has access, at all times, to the XTRF through the portal, and thus has continuous access to all open projects, expected projects, billing details, invoices, assignment summaries, rates, etc.

This is also true for the customer, who can at any time check the current status of ongoing projects, the history of projects, the budget for translation, as well as access the files as soon as they are ready.

On completion of all the workflow steps, the Project Manager may send to the customer an automatic e-mail notification of the project completion, with a link to the files which are ready to be downloaded.

The case with financial settlements is similar, as the system does the job of checking which projects need to be invoiced, settled, or paid on which day. Both customers and subcontractors have access, at all times, to invoices and billing information, as well as to lists of payments which have not yet been settled.

A single technology platform which collects all the above data ideally matches the contemporary management practices, where the reports required by the management are only one click away, and where managers supervise the company's operations from any location in the world. Employees do not have to waste their valuable time on preparing summaries and reports for their supervisors and managers, and the latter have a continuous access to updated information, whether they work from the office, home, hotel, or restaurant.

Importantly, the XTRF-TM system features a number of solutions which ensure that the company operations comply with the ISO 9001 and EN 15038 standards. All records and documents required by those standards are also created on a single XTRF-TM platform. This applies both to information on subcontractors' competence, sales trends analysis, process efficiency analysis, complaint or non-compliance records, as well as to corrective and preventive actions.

The work of salespersons also deserve a mention here, because they can work on acquiring new customers or projects from any place in the world, by using the system's data, or by entering new data on customers, meetings, rates, price lists, quotations, or awarded projects.

### **Benefits of on-line collaboration using the XTRF-TM platform.**

First, appropriate configuration of the XTRF-TM system enables considerable savings on the working time, as well as boosts working efficiency. Most of repetitive actions can be automated using the platform. What is more, those workflows which are most often used can be defined, so that projects can be created semi-automatically, and projects definitions can be copied from one language combination into another in the case of multiple-language projects. This means that to create a 20-language project does not take significantly longer than to create and launch a single-language project.

Additionally, the XTRF-TM allows you to define any number of reference projects, if the customer often assigns a given type of project for the same language combinations, requiring the same subcontractors to be used. If this is the case, then another project from the series can be launched and defined based on the reference project in several seconds only. Importantly, all translation projects are automatically prepared and made available in the integrated CAT tool, provided by XTM Intl.

The subcontractors' work in the online XTM tool has another salient advantage, namely it ensures full control of the text and potential access to it by third parties. The files are never sent, as all subcontractors work with the project which is made available only, and physically located on the premises of the company which employs the XTRF-TM platform. The only persons who can access the project are those who have logins to the XTRF-TM systems, and the access is granted only for the project duration.

Another important benefit is error elimination. All data are input into the system only once,

and users have access to them as part of the assignments they work on, and in the modules assigned to them. The system is also provided with a useful prompting/defaulting feature, helping to enter information on projects, terms of collaboration, prices, invoicing and payment details. Integration with the XTM tool also relieves the project manager of the duty to analyse files and paste the outcome of the analysis in the quotation. These actions are performed automatically, which eliminates the risk of human error, and speeds up the work considerably.

Further, when all users have access to the same data (based on their respective authorisations), it is much easier to identify errors, should they occur.

The system is also provided with a number of modules, which present important details on the current projects and assignments, allowing the project manager to effortlessly control everything that is important on a given day.

Customers' and subcontractors' access to the data ensures full transparency of the company's operations, thus improving the collaboration culture.

Finally, it is worth noting that the system enables its users to group and structure data in the reports, in order to provide a better justification for business decisions. Whether in the area of sales strategy, production management, customer portfolio management, internal staff management, or investment planning, the XTRF system generates the relevant reports which are at all times available to the management, regardless of the location they work from.