Working with CLM

CLM stands for *Corporate Language Management*. STAR Translation Services is gradually moving to use CLM Workflow.

You have two parts:

- CLM for your list of Projects.
- CLM WebEdit for Translation and proof.

You can chose to work online via CLM WebEdit and benefit from a streamlined workflow with a simplified Transit editor <u>OR</u> continue to work locally as before, by downloading the <u>PPF</u> and work offline using your full Transit desktop application. Both options are designed to be more efficient for you and this document details both ways of working

CLM WebEdit will save you time particularly on the simpler small projects.

With CLM WebEdit you will:

- Save Time and so you can focus on your craft.
 - Downloading Transit kits, unpacking PPFs and dictionaries takes time. With CLM WedbEdit this is all available to you online.
- Complete your projects with a single click.
 - No need to pack & upload TPFs on the Portal; click the Complete Button and move on!
- Get immediate QA Feedback as you work on a Segment.
 - QA checks are done live without requiring you to even start the Checks.
- Choose what works best for you!
 - You still have the option to work online OR download a PPF & work offline and have all the power of the full Transit environment.

Getting started with CLM WebEdit.

- When you first start using CLM WebEdit a **Quick guide** will appear.
- Click on the ? icon to see the Keyboard short cuts and the Quick guide.

This document covers the details of CLM relevant for you.

Additionally, the STAR Development Team has prepared <u>Training videos</u>. These videos are confidential and are available on our STAR TS Supplier Portal, once you are logged in.

If you have any feedback, please get in touch with resources@start-ts.com.

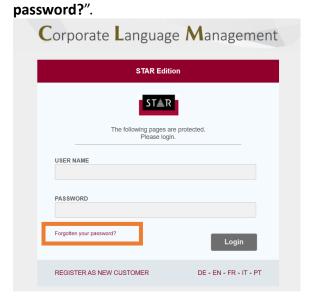
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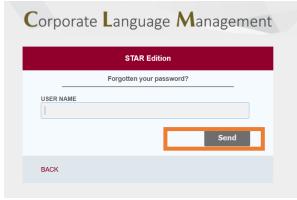
1. Logging in to CLM for the First Time

If this is your first time using CLM, you will need to customise your password.

Go to https://stdub-clmclient.star-group.net/jamesweb/default.aspx and click "Forgotten your

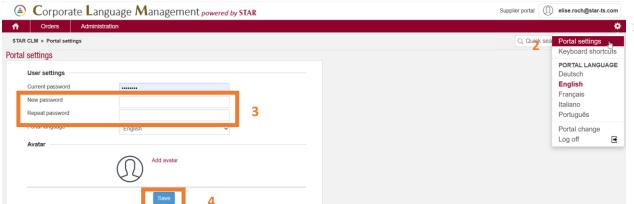


In **USER NAME**, insert your email address. The email address must be the <u>same</u> as the one you use for the STAR TS Supplier Portal. Click **Send**.



You will receive a <u>Temporary</u> Password by email. Change this password: Enter your email address in the **USER NAME** field and log in using the Temporary Password.

On the Right-hand side, click (1) > Portal Settings (2): insert your New password (3) and click Save (4).

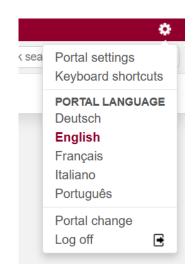


2. CLM Interface Overview

2.1. Settings Menu

Open the settings by clicking on (top right corner).

- Portal settings: Option to change password, portal language and avatar.
- o **Keyboard shortcuts**: List of all available keyboard shortcuts.
- o **PORTAL LANGUAGE**: Change the portal language with one click.
- Log off: Log out of CLM.



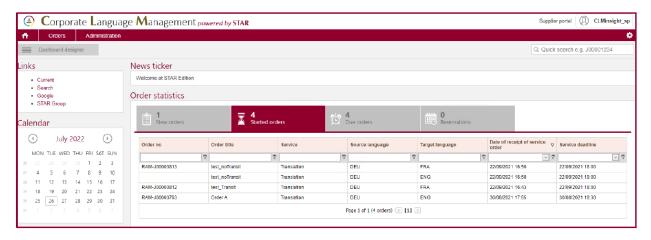
2.2. Dashboard Menu

The dashboard opens after logging in or by clicking on the button. It gives you an overview of all CLM "orders" (i.e. projects) that you have been selected to work on.

The following tabs are available under Order statistics:

- **New orders**: projects still pending your acceptance.
- Started orders: all open projects that you have accepted.
- Due orders: all projects for which the delivery deadline has already passed.
- Reservations: projects for which you have already been pre-selected as a supplier by the
 project manager these orders are not yet active in your supplier portal. They will
 become available under the New orders tab as soon as the order is sent to you.

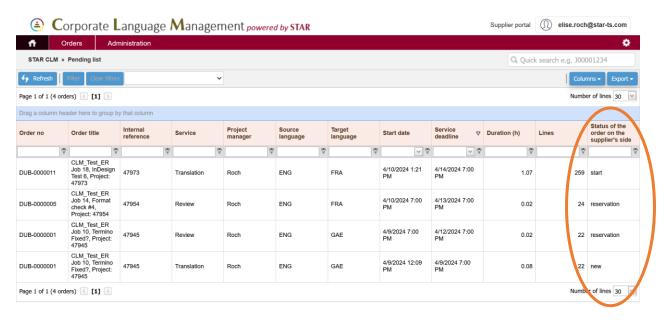
Click on a language order to open the order details. This will take you to the Order page where you can see the Statistics, Deadline, instructions, check the source file before accepting/rejecting the order, etc.



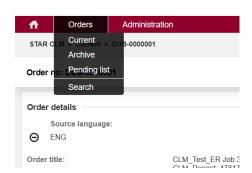
2.3. Orders Menu

This menus displays orders depending on their type:

- **Current**: all accepted orders AND pending acceptance.
- Archive: When an order is completed or cancelled, it is move to the "Archive.
- Pending list: shows all orders, except archived orders.
 Order status:
 - New: Orders pending acceptance
 - <u>Start</u>: Accepted orders
 - <u>Reservation</u>: Orders for which you have already been pre-selected as a supplier by the project manager – these orders are not yet active in your supplier portal. The status will change to "new" once the service is sent to you. It will then change to "Start" once you have Accepted the order.



Search: use for filtering orders based on numerous criteria.



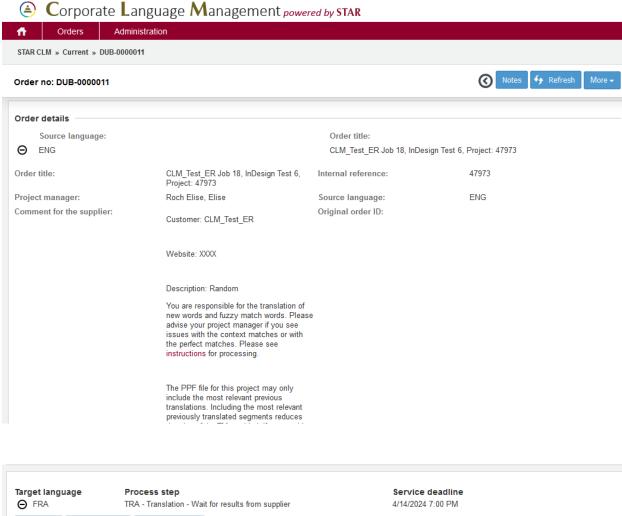
3. Receiving a New Order

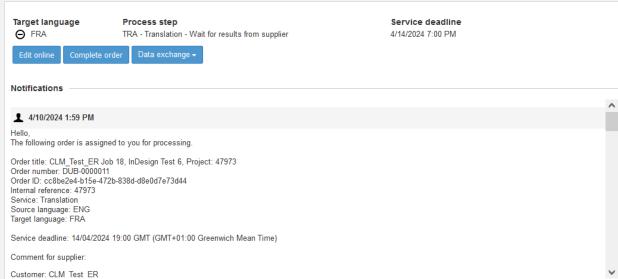
You will receive a notification that a **New Order** is assigned by email.



Click on the **CLM order link** to access the project in CLM.

This opens the "Order" page.



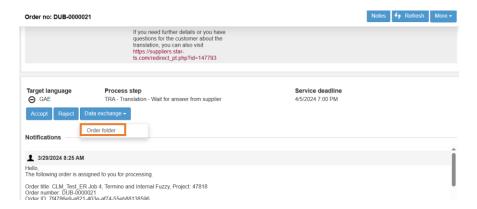


All emails sent by CLM are displayed chronologically in the **Notifications** section.

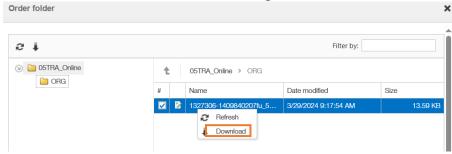
Please note that for invoicing: the total & Project ID for your invoice are visible on the STAR TS Supplier Portal (not in CLM!).

3.1. Checking the files before Accepting / Rejecting a project

The original files can be viewed under "Data exchange" before accepting or rejecting the order. Click **Data exchange** | **Order Folder**



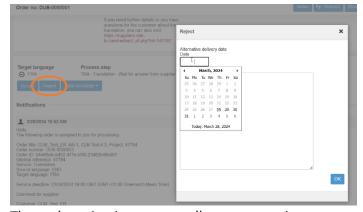
Click the ORG folder – this shows the original files. Select the file and Right click "Download".



You can then open the file from your *Downloads* folder in File Explorer.

3.2. Rejecting an order in CLM (option to <u>Suggest an Alternative Deadline</u>)

Click "Reject" to reject the order or suggest an alternative deadline.



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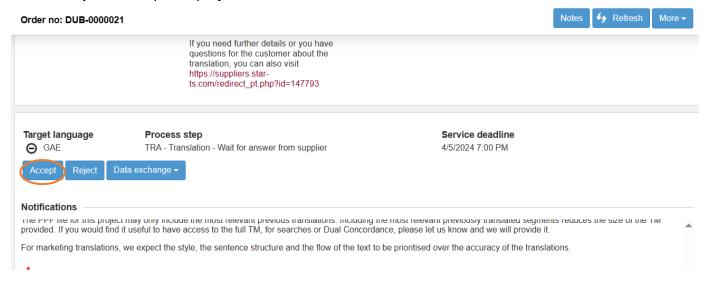
- The *order rejection* pop-up allows you to give a reason for the rejection, in the text field.
- You can also suggest an alternative delivery date using the Calendar.

Click "OK".

The order bounces back to the Project Manager who will change the deadline of the order and send the project back to you OR reassign the project if the deadline is not flexible.

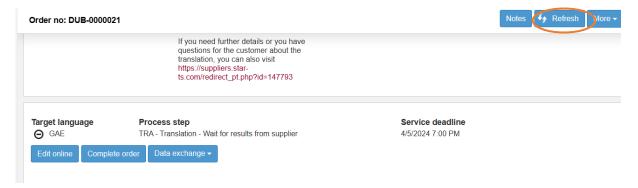
3.3. Accepting an order in CLM

Click "Accept" to accept the project & deadline.



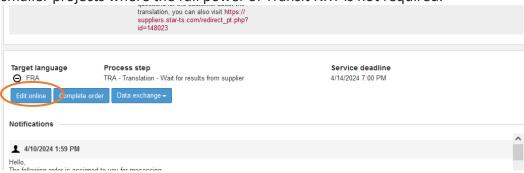
NOTE: when you "accept" you also accept the deadline. To suggest an "alternative deadline", you will need to reject the project first.

Once you have Accepted the Order, click the Refresh button



4. Edit online: Translation and Review in WebEdit

Click the **Edit online** button to start editing online in CLM WebEdit. This option is best for the smaller projects where the full power of Transit NXT is not required.

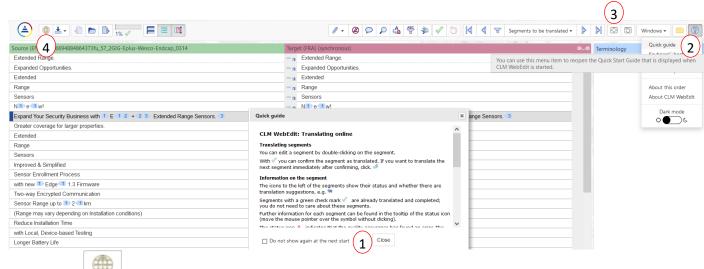


4.1. WebEdit Overview

Quick guide

The "Quick guide" window will pop up upon opening a project in CLM WebEdit. This will always be the case unless you tick "Do not show again at the next start" (1).

You can access the quick guide from the help button (2) if needed.



The button (4) takes you back to the CLM Supplier Portal.

The CLM WebEdit Quick Guide can be accessed at any time via the help menu. A list of the **keyboard shortcuts** is also available from the Help Menu .

Hovering over the segment column gives you more information regarding the status of the segment.



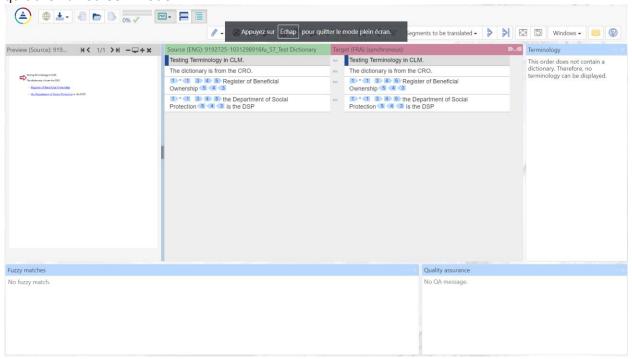
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Additionally, the interface will show tooltips when you mouse hover over the buttons.

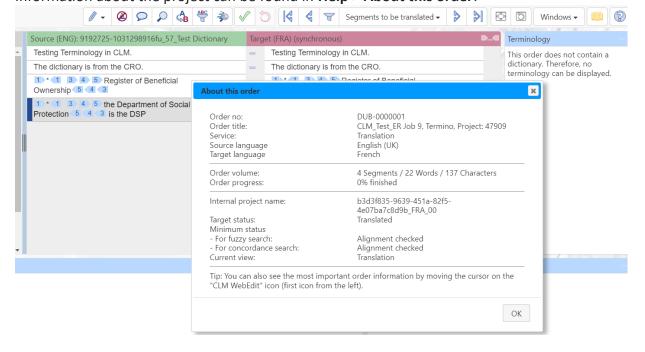
Full Screen mode

Click to open the editor in **Full Screen mode (3)**. We recommend you work in Full Screen Mode to get as close as an experience as working in any desktop application. The *Esc* key will quit the Full Screen Mode.



Information about the order

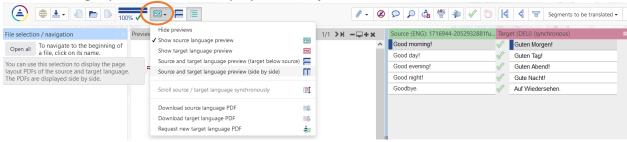
Information about the project can be found in **Help > About this order**:



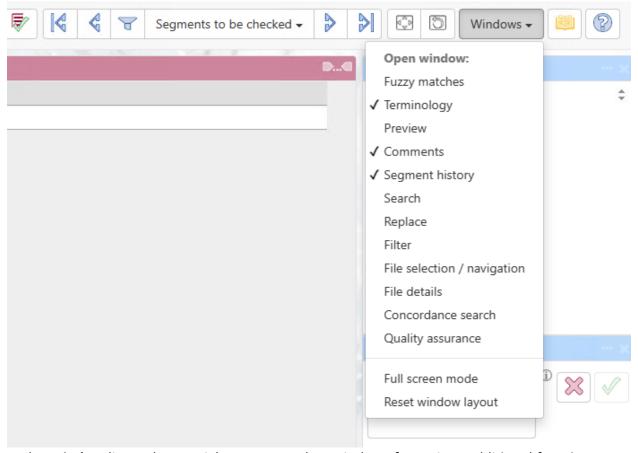
Views

By default, CLM provides a dedicated View for Translators, and a dedicated View for Proofreaders so that you see what is relevant to your task.

A source/target preview can be displayed in the **preview** window for MS Office files.



The preview window, along with other windows (e.g. for fuzzy matches and concordance search), can be displayed via the **Windows** button and then positioned.

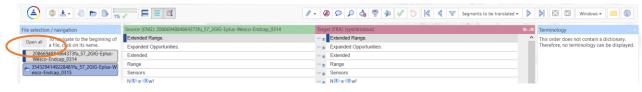


In the **Window** list at the top right, you can select windows for various additional functions. You can move the windows with "Drag & Drop" and "dock" them to the edge of the screen.

Note: View settings are saved in your cookies so you don't have to change the view each time.

Orders with Multiple Files

If an order contains several files, click "Open all" under File selection / navigation to open all files in the editor.

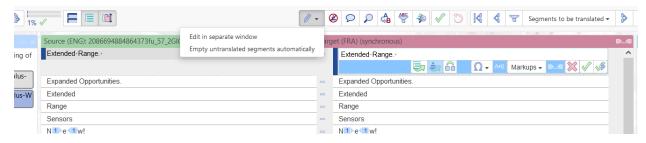


You can also switch between the files using the buttons



4.2. Editing

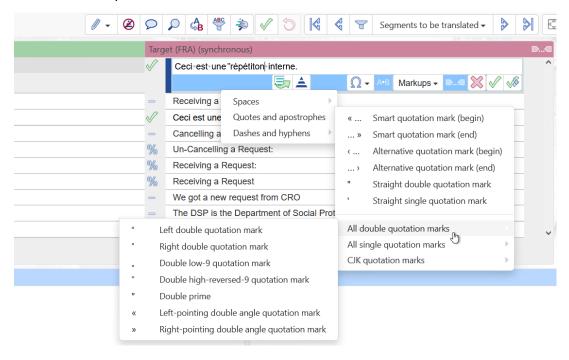
To start editing a segment, double click on the segment.



For untranslated segment, the source text is kept in the Target editor by default. If you prefer to empty the segment for editing, click the **edit** vertical button and select **"Empty untranslated segments automatically"**.

You can populate the source back into the target using the button.

You can insert special characters via the Ω button.

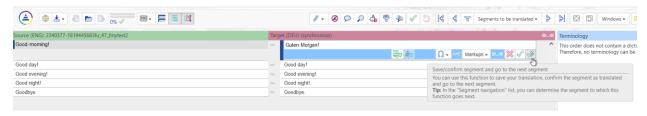


To display spaces, click the button. Spaces are displayed both in source and target when you edit a segment.

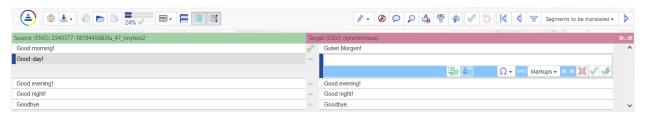
Confirming a Segment as Translated

To confirm a segment as translated; click the **confirm** button. Or click to **confirm** and **go** to the next segment.

Note: If you do not confirm the segment, your edits will not be saved.

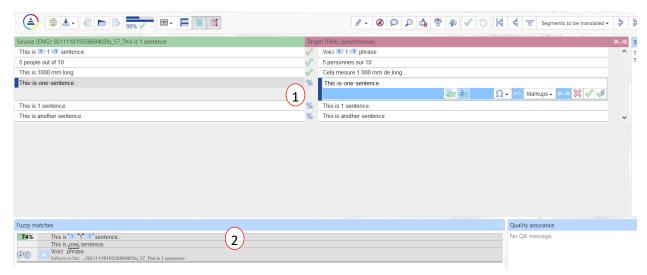


Once you have confirmed a segment as Translated, the symbol is displayed in the segment info column.



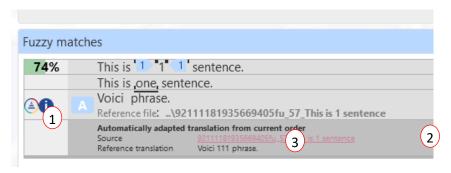
Fuzzy Matches

Segments that have Fuzzy Matches Suggestions are identifiable with the segment column (1). Fuzzy suggestions are displayed in the Fuzzy matches window (2).



Hovering over the $\stackrel{ ext{@}}{=}$ icon shows you where the suggestion is coming from.

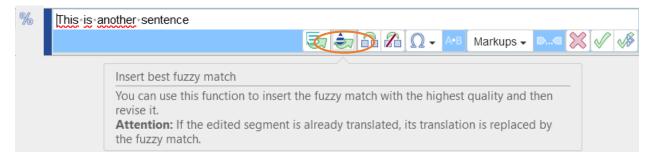
Click the info button (1) to show more details (2).



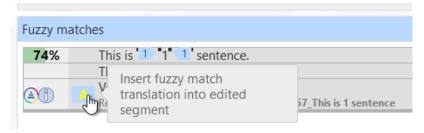
Clicking the **Source** link (3) opens the reference file in a separate window, where you can check the reference segment in context.

Note: The Fuzzy matches window is <u>Read only</u>. <u>You can only edit fuzzy matches when you are</u> in edit mode in the Segment

To populate the top Fuzzy Suggestion into the Editor, click the 🚉 button.



Alternatively, click on the letter from the **Fuzzy Matches** window to Insert the fuzzy match into the segment.



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Next, edit and then confirm the segment.

Assigning Markup

By default, the source text is kept when editing an untranslated segment. Markup is shown in blue tags. You can replace the source text with your translation in between the relevant tags.



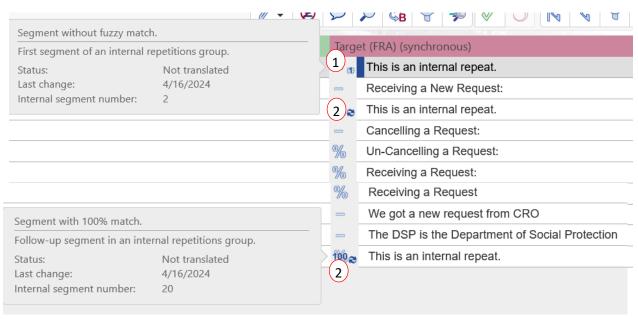
You may need to add markups; for example, if you deleted a tag or if you work with the Edit mode "Empty untranslated segments automatically".

To add the markup: select the text (i.e. highlight) you want to apply the markup to (a), click Markups (b) and click on the markup tag to apply (c).



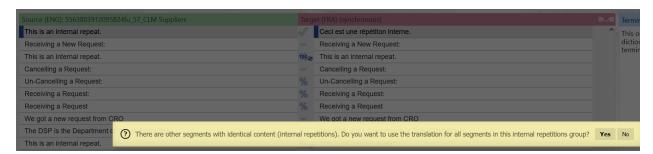
Internal repetitions

The first occurrence of an internal repetitions is flagged with the symbol in the Segment info column (1). Follow up repetitions are flagged with the symbol (2).



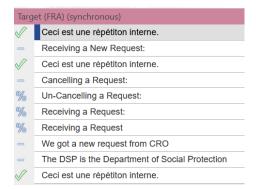
Edit the first segment of the internal repetition group.

Upon confirming the segment, the following message pops up: There are other segments with identical content (internal repetitions). Do you want to use the translation for all segments in this internal repetitions group?



Click "Yes" to populate the translation to all follow-up repetitions segments.

All segments from this internal repetition group are now edited and confirmed $^{\vee}$.



If a translation variant is absolutely required, you can edit the relevant segment and **confirm**. Click "No" to avoid populating the change back into the internal repeat group.



Variants

There is currently no Variant check in CLM Web Edit. Variant check will be included as part of the QA in future releases of CLM Web Edit.

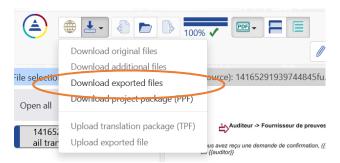
Grammar / Spelling

There is currently no Grammar, and no Spellchecker in Web Edit. You can:

Use the spellchecker from your Internet Browser.

OR

Export the translated file(s) and run the Spellcheck using MS Office.
 To export the translation, click the button and "Download exported files"



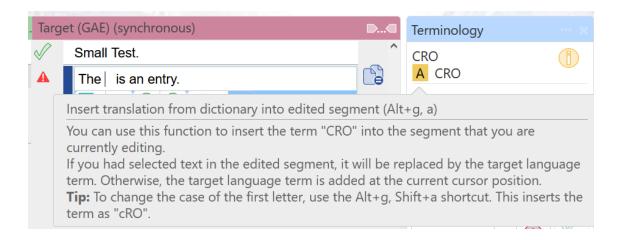
- You will then need to implement the changes (if any), manually, in CLM Web Edit before completing the project, just as you have been doing in Transit NXT.
 - Please, DO NOT use the "Upload exported file" button:
 - Uploading the exported file back WILL NOT implement the changes in your translation/proofreading. You need to implement the changes directly in WebEdit.
 - It may result in an error and the project won't move to the next stage.

Terminology

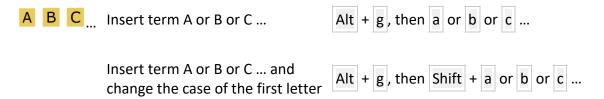
By default, if a segment includes terminology, the Term is displayed when editing the segment on the right hand-side in the **Terminology** window.

You can insert terms from the terminology window into the segment you are currently editing in edit mode.

NOTE: Terminology check is not currently available in CLM Web Edit. Terminology check will be included as part of the QA in future releases.

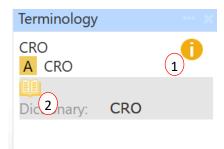


Click on the letter from the Terminology window to insert the term into the segment; or use the shortcuts detailed below.



If you had text selected in the edited segment, it will be replaced by the target language term. Otherwise, the target language term is added at the current cursor position.

If there are more than 1 target term, click the info icon to display more information (if there is any) (1).Click the dictionary icon to access the full dictionary (2).

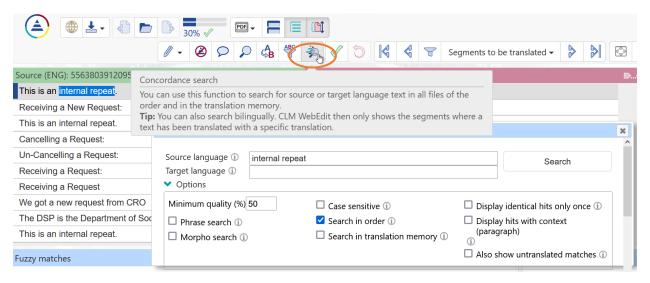


Tip: To display the terminology window, select **Terminology** from the **Windows** list on the top right.

Concordance search

To run a dual concordance search; select the term (highlight) and click the dual concordance search \clubsuit button.

This opens the **Concordance search** window where you can customise the search under **Options**. Click "**Search**" to display the results.



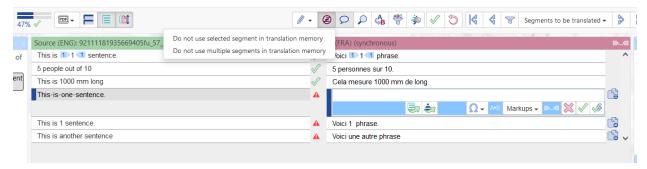
Exclude from TM

To exclude a segment from the reference material, select the segment and click the "**Do not use** selected segment in translation memory" button.

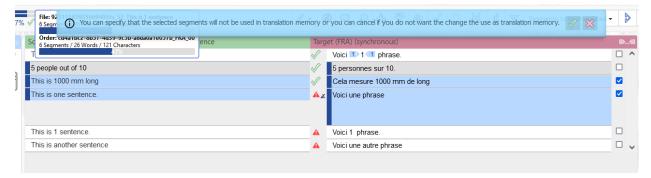
The following symbol 'is displayed in the Segment column to flag that this segment is excluded from the reference material. Voici une phrase

The translation of this segment will not be reused in future projects. It will also be excluded from dual concordance searches.

You can exclude several segments at a time, by right-clicking the button and clicking "Do not use multiple segments in translation memory".



Select the segments to be excluded via the tick boxes on the right and click the confirm button. To cancel, hit the cancel the button.



Virtual join

If two segments should be merged into one for translation purposes; or to fix a segmentation error and have a clean TM: click the button – translate / review and confirm the segment.

Note that you can only join segment if there are not split by a paragraph break. If they are, the option won't be enabled.



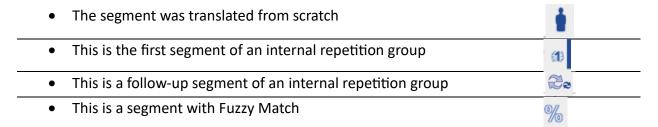
Source and target segments are now joined. You can undo by clicking the button:



Proofreading in WebEdit (REV)

1. Segment info column

The icons to the left of the segments provides information about the Segment Status and how it was translated:



Segments that have the green check mark \checkmark are already confirmed; you can ignore these segments as they are not in scope.

For further details on each segment, use the tooltip of the status icon (move the mouse pointer over the symbol without clicking).

The status icon indicates that the quality assurance has found an error. The detailed messages can be found in the **Quality Assurance** window (see more details in section 5 Quality Assurance (QA) below).

2. Editing and Confirming a segment as "proofread"

To confirm the selected segment, click the $\sqrt{}$ icon **at the top** (1). You can also use the shortcut **Shift+o** (as long as you are not in "editing" mode). Pressing the down arrow key takes you to the next segment for review.



You can also confirm several segments at once:

- All segments from the beginning of the file to the selected segment (♥) (2) or
- All segments of the file (\$\varphi\$) (3).

You can edit a segment by double-clicking on the segment.

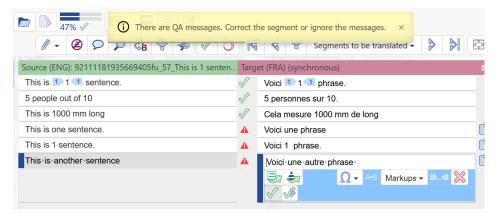
- With you can confirm the corrected segment and go to the next.
- With you can discard your changes.

5. Quality Assurance (QA)

The QA is done online, on the fly during the translation/proofreading. The QA check kicks in automatically upon confirming a segment as "Translated" / "Proofread".

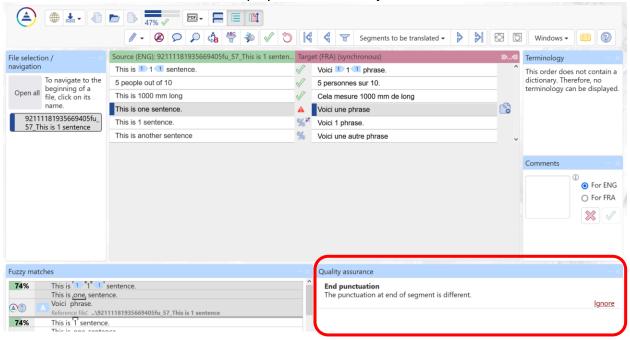
5.1. Resolving QA messages

If potential errors are found a yellow window pops up: "There are QA messages. Correct the segment or ignore the messages".



All QA messages must be processed. If QA errors are left unresolved, CLM will automatically bounce the project back to you after you have "completed" the order.

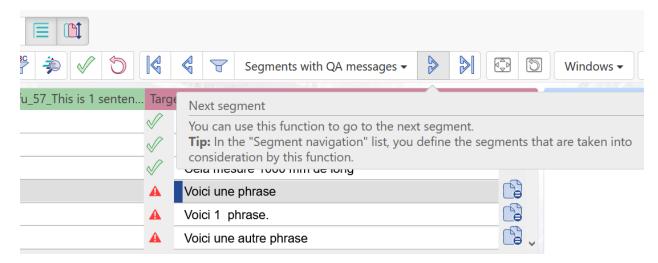
If the QA identifies a potential error, the icon is displayed in the Segment Column. The details of the Errors found are displayed in the **Quality Assurance** window.



Click "Ignore" to Ignore false positive errors. Fix real errors and confirm the segment \forall to save your changes.

5.2. Navigating to unresolved QA segments

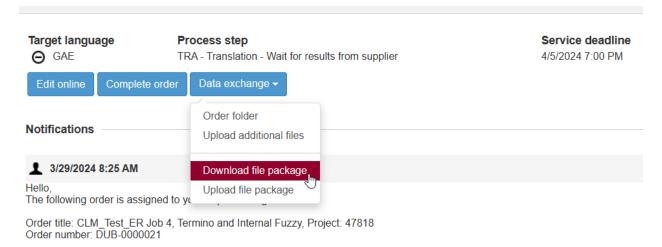
To navigate to unresolved QA segments, click the "Segment navigation" drop-down and select "Segments with QA messages". Click the arrow to navigate to the next segment with unresolved QA.



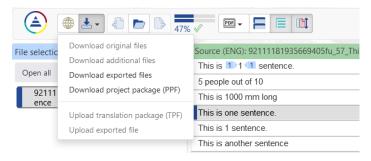
Once you have finished the translation / review task and the QA, you will need to **Complete** the project to deliver it. See section **7 Completing an order** for more details.

6. Working Offline: Translation and review from PPF

If you wish to wok offline, after you have accepted the project, click the **Refresh** button Click **Data exchange** > **Download file package** to download the PPF and work offline.



Alternatively, click "Edit online" to open the project in WebEdit and "Download project package (PPF)".



The PPF is downloaded.

Refer to SOP 11 for details on working with Transit offline.

To upload the TPF back, access the Order and click **Data exchange** > **Upload file package**. Alternatively, access the order in WebEdit and click **Upload translation package (TPF)**.

Next you will need to **Complete** the Order.

NOTE: if you change your mind and prefer to work online... you can also Upload file package (TPF) and continue editing online. This function is only available if the PPF was previously downloaded in CLM WebEdit. The file must be packed in Transit and uploaded again as TPF in CLM WebEdit. If all of these steps have been followed but the upload option is still greyed out, press the F5 key to refresh the browser.

7. Completing an order

An order must be completed using the **Complete** order button; regardless of if you used WebEdit or worked offline.

The project is not "delivered" and cannot move to the next step until you **complete** the order.

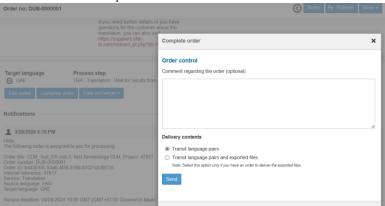
7.1. Delivering a project

To deliver the project, go to the CLM order and click the "Complete" button.

You can enter a comment for the next editor, project manager and/or customer in the pop-up window.

Unless instructed otherwise, only deliver Transit language pairs (do not tick "Transit language pairs and exported files").

Click **Send** to complete the order.



Upon completion of the order:

- The language order can no longer be edited.
- The order PDF is no longer available.
- The language order is no longer listed under Orders | Current but under Orders | Archive.
- The language order is removed from the pending list.

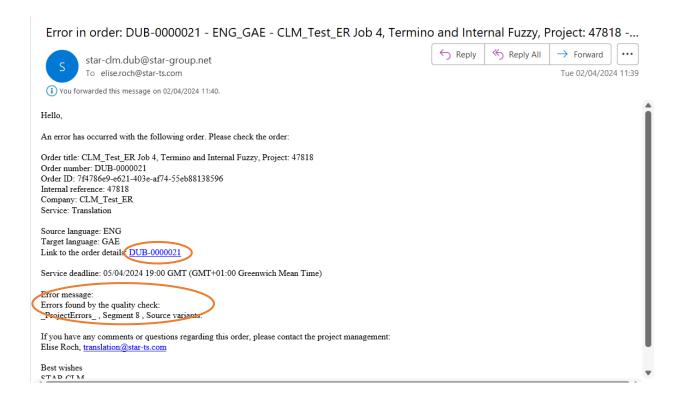
If all is OK with your delivery; you will receive an email with Subject "Successful delivery".

7.2. Delivery bounce (how to Navigate to segment & fix)

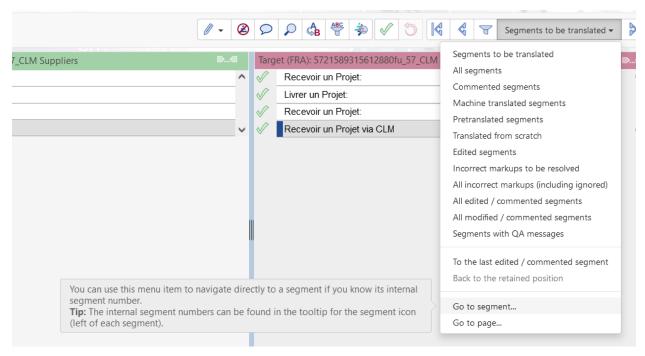
If any QA messages are not resolved, the project will bounce back to you.

You will be notified by email.

Click on the link to access the CLM order, and fix the issues reported in the email.



Open the project in WebEdit, click the "Segment navigation" drop-down and select "go to segment..." to navigate directly to the segment number from the error message.

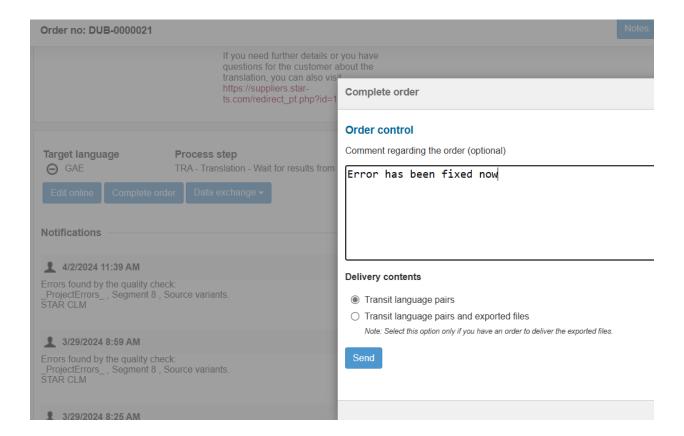


Once all issues have been fixed and false positive errors have been ignored:

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Complete the project.

Add any relevant comment and click "Send".



8. Questions

CLM has no Q&A system. Keep using the STAR TS Supplier Portal for Q&A.

A link to the Project on our Portal is available in the order notification.

Click this link to access the Portal.

New order: DUB-0000021 - ENG_GAE - CLM_Test_ER Job 4, Termino and Internal Fuzzy, Project: 47818 - Translation



It is a requirement for this project to read, follow and comply with our Irish Style Guide Instructions.

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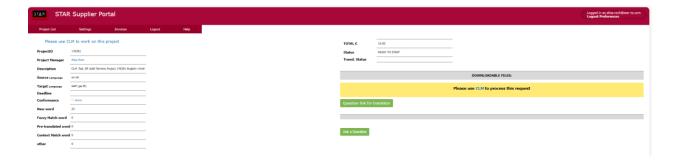
If you need further details or you have questions for the customer about the translation, you can also visit https://suppliers.star-ts.com/redirect_pt.php?id=147793

Instructions for the processing step:

Check if Stats after Supplier Selection include Internal Fuzzies

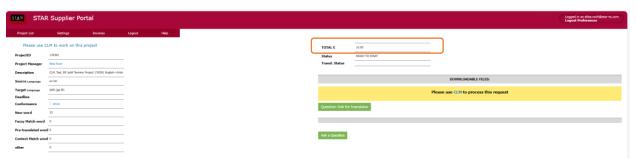
Statistics (Words)

Submit your questions using the "Ask a Question" button. Refer to SOP 11 for more details



9. Invoices

The total to be invoiced will be displayed on the STAR Translation Services Portal and **not** in CLM.



Process for invoices remains the same.

Refer to <u>SOP 11</u> and STF-5 SupplierFinanceDetailsAndPolicy.docx for more details.

10. DTP/layout orders in the supplier portal

DTP orders are processed in the supplier portal using the data exchange function.

The files are downloaded via **Data exchange** | **Order folder** from the **ORG** folder.

The file must be selected in the folder, then it can be edited <u>after downloading</u> it by clicking on the button. The upload of finished documents is done via the **Upload files** button.

Appendix

A. Training Videos

Training Videos from the Web Edit Development team can be found in https://suppliers.star-ts.com/helpdocs/restricted/CLM Training Videos/

- Basics CLM-WebEdit.mp4
- Translation_CLM-WebEdit.mp4
- Revision CLM-WebEdit.mp4
- Quality-Assurance CLM-WebEdit.mp4
- Translation-via-PPF-TPF CLM-WebEdit.mp4

NOTE: you must be logged in on the STAR TS Supplier portal to access the videos.

B. Keyboard shortcuts: Editing online

You can use the following keyboard shortcuts to access the main functions of CLM WebEdit:

	Edit selected segment	Shift + e
\checkmark	Confirm selected segment (the shortcut Shift + o does not work in "editing" mode, i.e. if you are editing a segment use the Confirm button instead)	Shift + o
\bigcirc	Comment on the selected segment / show segment comment	Shift + c
	Search text	Shift + f
Å B	Search and replace text	Shift + h
	Navigate to the last edited or commented segment	Shift + z
	Return to the segment from which you navigated to the last edited / commented segment (using Shift + z)	Shift + y
	Ignore all "ignorable" QA messages for the selected segment "Ignorable" messages refer to deviations that may be linguistically necessary (e.g. additional formatting or intentionally different end punctuation). You cannot ignore messages for structurally necessary markups (e.g. index markers, image anchors, hyperlinks). Tip: The keyboard shortcut Ctrl + i is intended for use in edit mode. With	Shift + i Ctrl + i

You can use the keyboard shortcuts when you are <u>not</u> in edit mode (i.e. not currently editing a segment).

Which functions are actually available to you depends on the current view and your rights for the current order.

Shift + i you would insert a capital "i" there.

C. Keyboard shortcuts - Terminology: Inserting terms from a dictionary

For orders with a dictionary, you can insert terms from the terminology window into the segment you are currently editing in edit mode:

If you had text selected in the edited segment, it will be replaced by the target language term. Otherwise, the target language term is added at the current cursor position.

Tip: To display the terminology window, select **Terminology** from the **Windows** list on the top right.