Trados Business Manager

RWS

Course Title: Trados Business Manager for Administrators and Project Managers

Learning Objectives: This course is designed for users who want to get familiar with Trados Business Manager quickly. It will walk the users through all the configuration steps necessary to turn an empty system into a working one. The course will first focus on the administrative tasks, then will address topics relevant to Project Managers.

- Part 1: TBM for Administrators
    - Introduction to Trados Business Manager
    - Navigating the User Interface
    - Setting up the system
    - Configuring Reference Data
- Part 2: TBM for Project Managers:
    - (Introduction to Trados Business Manager)
    - (Navigating the User Interface)
    - (Configuring Reference Data)
    - Running a translation project with and without the client and vendor portals
    - Optional: Running a translation project outside the context of a project
    - Optional: Connecting TBM with Trados Studio and Trados GroupShare
    - Optional: Getting started with reporting

Target Audience: This course is for both administrators and project managers who have never used Trados Business Manager before and want to get started with the configuration and the use of the application to be productive from day one.

Prerequisites: Basic understanding of PCs, the Windows operating system, and Trados Studio.

Access for the trainer to the customer's system.

Course Delivery Mode: This course is available in the following delivery modes:

- hands-on and classroom-based, delivered over 1 day
- live and web-based, delivered over a total of 4 hours, broken up into shorter sessions.

The course will be split into 2 distinct parts:

- The first part will be aimed at Administrators and will give them an introduction to TBM, then walk them through the configuration of the system.

- The second part will be aimed at Project Managers. If they haven't participated in the first part, Project Managers will be introduced to the TBM User Interface, then will be shown how to use the application.

Further Information: For further information on any of our courses, training delivery options, course dates, the Trados Certification program, or course fees, please contact us at producttraining@sdl.com

Topics covered during the course

Part 1 – TBM for Administrators

Introduction

- Trados Business Manager Desktop vs. Trados Business Manager web application

- Logging on to Trados Business Manager

- Populating the system with demo data

- Logging off from Trados Business Manager

Navigating the User Interface of Trados Business Manager

- The main UI elements of Trados Business Manager

- The user account area on the Main menu

- The Main menu

- The Tab bar

- Working with dashboards

- The Navigation menu

- The toolbars in Trados Business Manager

- Managing lists, pick lists and pick list items

- Exporting and importing data sets

- Working with Data grids in Trados Business Manager

- Using the pager functionality in list views

Setting up the system

- Configuring the Main Application Settings

- Configuring data entry form layouts

- Configuring list views

Configuring Reference Data

- Adding languages

- Adding language pairs

- Adding Service types
- Editing Units
- Adding a Specialization
- Configuring price lists
- Configuring Analysis import settings for fuzzy bands
- Adding Check-lists
- Configuring Workflows
- Configuring the E-mail system
- Adding a role
- Cloning a role
- Adding a client
- Adding user accounts
- Adding a vendor

The vendor portal

- Self-registering as a new vendor
- Logging on to the vendor portal of Trados Business Manager
- Configuring the automatically created vendor and user accounts in TBM

The client portal

- Creating a user account for the client user
- Logging on to the client portal of Trados Business Manager

Part 2 – TBM for Project Managers

Introduction (OPTIONAL – If not attended Part 1)

- Trados Business Manager Desktop vs. Trados Business Manager web application
- Logging on to Trados Business Manager
- Populating the system with demo data
- Logging off from Trados Business Manager

Navigating the User Interface of Trados Business Manager (OPTIONAL – If not attended Part 1)

- The main UI elements of Trados Business Manager
- The user account area on the Main menu
- The Main menu
- The Tab bar
- Working with dashboards
- The Navigation menu
- The toolbars in Trados Business Manager
- Managing lists, pick lists and pick list items
- Exporting and importing data sets
- Working with Data grids in Trados Business Manager
- Using the pager functionality in list views
- Sending E-Mail messages

Configuring Reference Data (OPTIONAL – If not attended Part 1)

- Adding languages
- Adding language pairs
- Adding Service types
- Editing Units
- Adding a Specialization
- Configuring price lists
- Configuring Analysis import settings for fuzzy bands
- Adding Check lists
- Configuring Workflows
- Configuring the E-mail system
- Adding a client
- Adding user accounts
- Adding a vendor

Running a translation project

- Creating a quote
- Creating a translation project from a quote

- Importing the translated file(s)
- Configuring the proofreading assignment
- Receiving the proofread document(s) from the vendor
- Delivering the translated document(s) to the client
- Sending an invoice to the client
- Registering a payment
- Registering an invoice from your vendor
- Creating a payment
- Checking your ledger

The vendor portal

- Self-registering as a new vendor
- Logging on to the vendor portal of Trados Business Manager
- Configuring the automatically created vendor and user accounts in TBM

The client portal

- Creating a user account for the client user
- Logging on to the client portal of Trados Business Manager

Running a translation project using the Client and Vendor portals

- CLIENT: Creating a quote request on the Client portal
- PM: Reviewing the quote and adding Quote items
- CLIENT: Accepting the quote
- PM: Configuring the translation project
- PM: Assigning the assignments to vendors
- VENDOR Emil Editor: Accepting the offered job
- PM: Confirming the accepted job offering
- VENDOR Thorsten Translator: Uploading the translated target file
- PM: Receiving the translated file and starting the Proofreading assignment
- PM: Starting the Proofreading assignment
- VENDOR Emil Editor: Uploading the reviewed target file
- VENDORS Thorsten Translator and Emil Editor: Registering their invoice
- PM: Receiving the proofread document
- PM: Approving the vendors invoices and registering a payment
- VENDORS Thorsten Translator and Emil Editor: Checking that the payment was processed
- PM: Notify client of the delivery
- CLIENT: Collect the translated and proofread file
- PM: Finishing and invoicing the project
- CLIENT: Retrieving the invoice
- PM: Registering the incoming payment

- PM: Closing the project

OPTIONAL: Translation jobs outside the project context

- Creating a translation job

- Importing the analysis results from your CAT tool to create Translation Job tasks

- Creating Translation job receivables

- Adding translatable files

- Adding a checklist

- Adding additional instructions

- Creating assignments

- Checking the translation project

- Sending a message containing the purchases order to your vendors

OPTIONAL: Linking Trados Business Manager with Trados GroupShare

- Linking a translation job with Trados GroupShare

- Creating a new project in Trados GroupShare

- Linking an existing project from Trados GroupShare

OPTIONAL: Linking Trados Business Manager with Trados Studio

- Installing the Trados Business Manager Connector plugin for Trados Studio

- Configuring the Trados Business Manager Connector plugin

- Associating a TBM translation job with a Studio project

- Creating a new project in Trados Studio

- Linking an existing project in Trados Studio with Trados Business Manager

OPTIONAL: Reporting

- Quick Reports

- Running a quick report

- Filtering data within a report

- Exporting report results

- Customizing pre-defined reports

- Creating a new report