

# Setting up the project

Under *Projects*, using the advanced or simple form, a project manager creates a new project, typically specifying:

- Source language
- Target language(s)
  - This is also the time to select a "First" language, often English
  - This language will be used to create the timed template which facilitates translation into the other languages
- Number of parts/episodes
  - And any relevant individual specifications, such as running time, part name, etc
- Project deadline
  - When is the whole project due

*Simple project form. The main data such as title and deadline is added in the top section.*

Dashboard / Projects / New project (simple form)

<b>Project title (required)</b> The Interesting TV Series	<b>Client keyword (required)</b> — N/A —	<b>General keywords</b> Nature	
<b>Status</b> New order	<b>Project manager (required)</b> — N/A —	<b>Production</b> — N/A —	<b>Delivery date</b> Delivery date

*Specify parts information. (By updating the "Number of parts" value, you get additional lines.)*

Part specification							
Part 1	Episode 1	30	Minutes	2020-04-2	Delivery d.	— N/A —	Content type
Part 2	Episode 2	28	Minutes	Media Dat	Delivery d.	— N/A —	Content type
Part 3	Trailer	2	Minutes	Media Dat	Delivery d.	— N/A —	Content type

*Select all target languages and specify which is "first".*

Language	Selected	Internal	First
English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Swedish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Norwegian	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Danish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
French (France)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
German (Germany)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spanish (Spain)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Besides this data, there are numerous other fields that can be used to provide additional information.

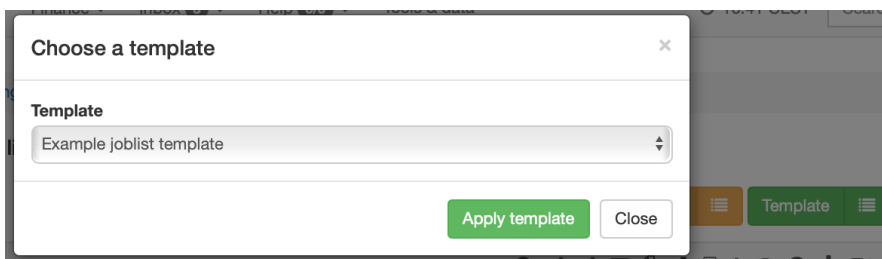
## Applying a joblist template

Once the project is in place, a [joblist template](#) is selected and applied to the project, creating the necessary jobs that need to be done in order to complete the project.

Click the "Job list" icon in the project bar of the newly created project.



On the joblist page, click "Template" and select a joblist template. (Generic example templates are included, but you would normally have a tailor-made template ready before this step.)



After the template is applied, jobs have been added to the project structure. Depending on the settings for each rule in the joblist template, they may already be assigned to users.

The Interesting TV Series 🔍 ✎ 📄 ⌵ 🗑️ 📁 + 💬 ⌚ ⬇️ 📺 🔄 📄

**New order** ID: 16 📅 N/A Jobs: 48 PM: Workbench User

100%

Project						+ Add job
1 - Episode 1						(30 Minutes) + Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation	
In process	372	Upload Media	Workbench User		Confirmed	✅ ✎ +
In process	373	Verify media	Workbench User		Confirmed	✅ 🗑️ ✎ +
English						+ Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation	
In process	374	Template	Acme Global Localization Inc.		Awaiting confirmation	✅ 🗑️ ✎ +
In process	375	Template QC	Justin Translator		Awaiting confirmation	✅ 🗑️ ✎ +
Swedish						+ Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation	
In process	376	First translation	Acme Global Localization Inc.		Awaiting confirmation	✅ 🗑️ ✎ +
In process	377	Second translation	Svea Svensson		Awaiting confirmation	✅ 🗑️ ✎ +
Norwegian						+ Add job
Status	ID	Title	Assigned to	Delivery date	Confirmation	
In process	378	First translation	Acme Global Localization Inc.		Awaiting confirmation	✅ 🗑️ ✎ +

## Assigning work or verifying automatic selections

Joblist templates can be set up to automatically assign the created jobs based on [criteria](#). They can also be made to simply store the criteria with each job, to make assignment easier later. In some cases, you may want to override all criteria and simply select users for some or all jobs.

The starting point in all these cases is usually the joblist. View the pre-assigned jobs, fill in the blanks, adjust where necessary, until relevant jobs have someone to do them.

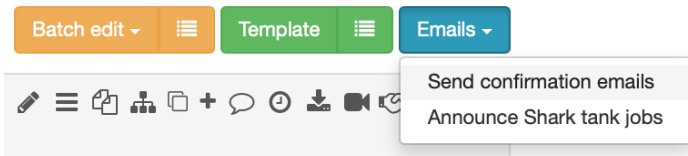
(Of course, in a perfectly set up system where all relevant information is available for all users, no visual confirmation is necessary and the assigned users can simply be notified.)

## Notifying users / requesting job confirmation

Jobs, especially outsourced ones, typically require **confirmation** by the assigned user. Regardless of whether they have been selected automatically by the system or manually by the project manager, there are tools for notifying the selected users right from the joblist.

Under emails, select the relevant notification options. They are similar in use, but made for different scenarios.

- **Confirmation** emails are sent to users who have been assigned one or more jobs that have the status "Awaiting confirmation".
- **Job tank** emails are sent to *all* users matching the job criteria for one or more jobs that have the "Job tank" option set to Yes.
  - (In both cases, only one *email* is sent to each user, summarising all the information.)



At this point, the workflow is all set up and relevant users have been notified. However, there may still be work to do for the project manager before work can actually begin. Read more under "

[Handling project media](#)".

---

Revision #14

Created 2020-04-29 13:51:22 UTC by Plint

Updated 2023-02-24 15:01:26 UTC by Plint