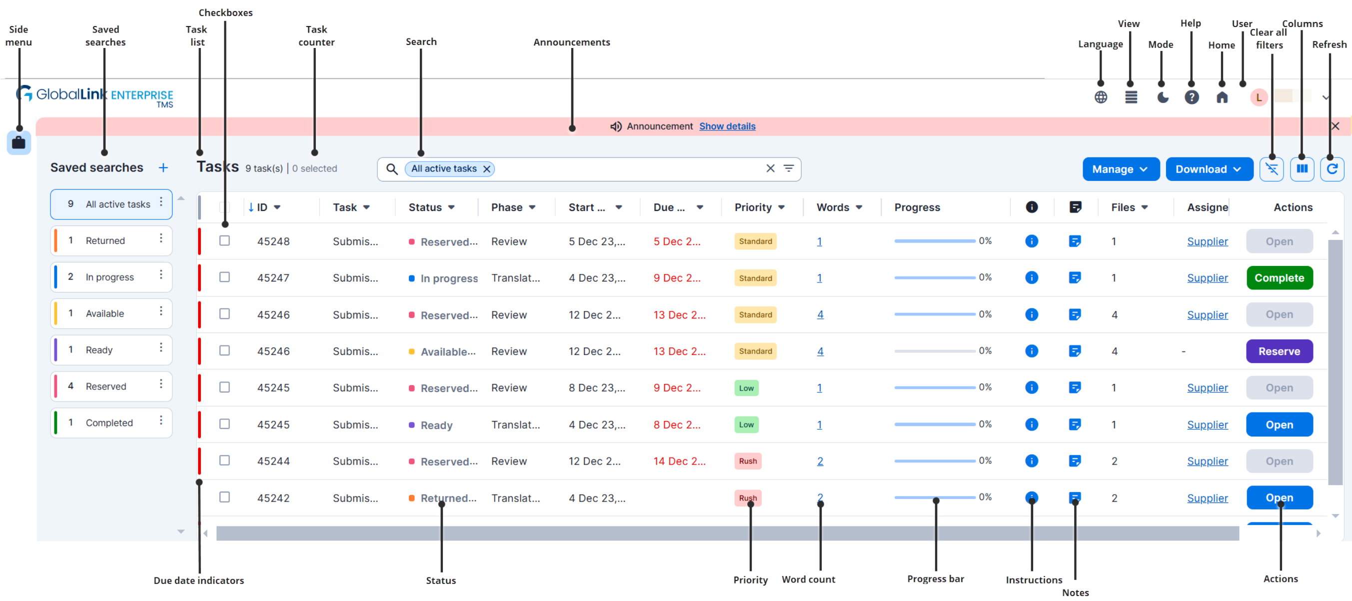
Supplier Quick Reference Guide

Tasks view

The GlobalLink Enterprise Tasks view lists your tasks and filters as saved searches. Below are key features of the Tasks view.



Component	Function
Side menu	Use the buttons on the Side menu to go to different application options.
Saved searches	Create filters to view subsets of your tasks, displayed as saved searches. Each saved search shows the name of the filter and the number of tasks it contains. Use ⋮ on a saved search to edit, clone, hide, or delete the filter.
Task list	Displays your task list.

Component	Function
	The Task list columns can be re-sized and moved based on your preference. Select the line between two column headings, and move the cursor to re-size the columns. Select a column and drag it to move the column.
Checkboxes	Select one or more tasks at a time.
Task counter	Keeps track of the number of tasks you currently have selected.
Search	Use to search for tasks either by name or by the task ID. Searching by the task ID requires an exact search, excluding leading zeros.
Announcements	Displays as a ribbon at the top of the page when you sign in to GlobalLink Enterprise. Click **Show details** to open the **Announcements** dialog, where you can view more detailed information about the current announcement.
Language	Use to switch the user interface to another language.
View	Use to switch between comfortable and compact view of the submissions list.
Mode	Change the user interface to dark or light mode.
Help	View the online help.
Home	Use to view the GlobalLink Home page where you can access other GlobalLink applications.
User	Displays the username.
Clear all filters	Clears all of your filters in use.

Component	Function
Columns	Select the columns of task information you want to display in the Task list.
Refresh	Refresh all the information of the tasks.
Due date indicators	Displays colored bars that show the status of upcoming task due dates. Set the timing for these alerts in the **Preferences**. • **Overdue**—Red • **Due soon**—Orange
Status	Displays color-coded indicators that show the current status of a task: Learn more about Tasks—Status on page 5. • **Available**—Yellow • **Cancelled**—Grey • **Completed**—Green • **In progress**—Blue • **Ready**—Purple • **Reserved**—Magenta • **Returned**—Orange
Priority	Displays the **Priority Level** of the task as one of three levels or urgency: • **Rush**—This task is very urgent. • **Standard**—This is a standard priority task. • **Low**—This is a low priority task.
Word count	Displays the total word count of all files in a task. Click the word count to open the Word count dialog that displays the word count analysis. From this dialog, you can download the word count as a CSV file.
Progress bar	Displays the work completed on a task as a colored progress bar:

Component	Function
	Learn more about Tasks—Progress on page 6. • Blue—Percentage of completed task work • Light Blue—Percentage of in-progress task work • Grey—Percentage of task work not yet started
Instructions	Displays the **Information icon** if there are any instructions for a task. Click the icon to open the instructions in the Drawer.
Notes	Displays the **Notes icon** if there are any notes for a task. Click the icon to open the notes in the Drawer.
Actions	You can do several actions from the Actions column buttons: • **Claim**—Click to claim the task. • **Open**—Click to open the task in an online editor. • **Open and download**—Click to open the task and download the files. This option is available when no online editor is configured. • **Reserve**—Click to reserve the task before the workflow phase is available to claim. • **Complete**—Click to complete the task. This option is available when all files in the task are uploaded.

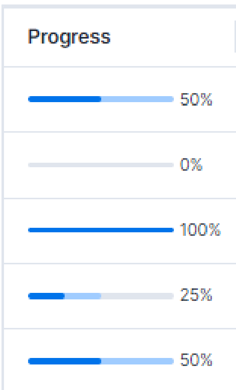
Tasks—Status

The **Status** column in the **Tasks** view helps you easily identify how you should proceed with the task.

Status	Description
Available	The Available status means that you are selected to work on the task, and the task can be claimed.
Cancelled	The Cancelled status means that all the files are cancelled and the task is no longer active.
Completed	The Completed status means that the work on all the files is done, and the files are uploaded.
In progress	The In progress status means that at least one file in the task was opened or downloaded. The task has now started, and the workflow is underway.
Ready	The Ready status is displayed in the following scenarios: • The task is assigned or claimed by you. • A previously reserved task is now available. • One or more files in the task that was returned to the previous phase, is now ready to work on.
Reserved	The Reserved status is displayed in the following scenarios: • The task is assigned or claimed by you but has not reached the workflow phase. • At least one file in the task was returned to the previous phase.
Returned	The Returned status means that at least one file in the task was returned to you from another workflow phase.

Tasks—Progress

The **Progress** column on the **Tasks** view displays task progress as a percentage between 0% and 100%. The percentage is calculated based on the number of files open, being worked on, and completed.



Colors in the progress bar display the status of the task.

Light blue	Indicates that the task has been claimed and is in progress.
Blue	Indicates that a user has completed one or more files in the task.
Grey	Indicates that the task has not been claimed.

Filter tasks

You can use filters to create custom groupings of tasks that you frequently access.

In the Tasks view, you can filter tasks in four ways:

- Click the **Quick filters** icon in the column header to select quick filter options.
- Click ↑ or ↓ in the quick filter options to sort the tasks in ascending or descending order.
- Enter a task name in the **Search by task name** search box to display the tasks that match the name.

- Click the + **Add new search** icon to select advanced search options, and save searches.

  The saved searches are displayed as cards in the **Saved searches** pane in the **Tasks** view and in the **Advanced search** dialog.

Tasks—Advanced filters

In the **Tasks** view, enter a task name in the **Search by task name** search box to display the tasks that match the name. You can add more filter options, and create a filter.

To use the advanced filters:

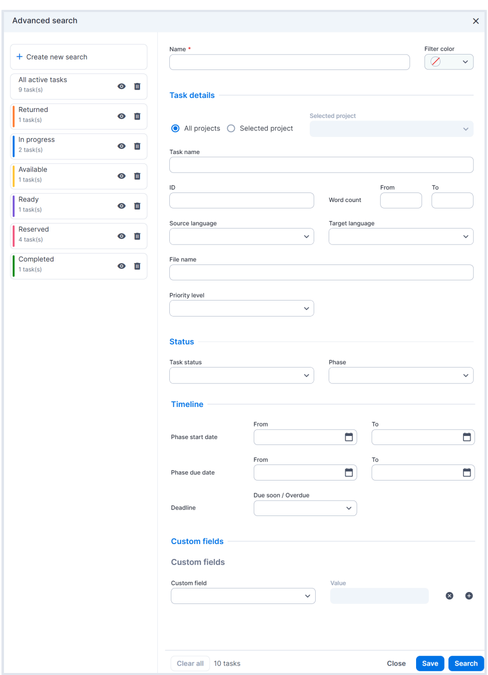
1. In the Tasks view, do one of the following:
   - On the right of the **Search by task name** search box, select Advanced search.

   - In the **Saved searches** pane, select + **Add new search** icon.

   The **Advanced search** dialog is displayed.

   Required fields are marked with a red asterisk.

> The **Advanced search** dialog also opens when you edit or clone a saved search. In the **Saved searches** pane, click ⋮, then select **Edit** or **Clone**.

2. In the **Advanced search** dialog, enter a **Name** if you want to save the filter.

> If you do not want to save this filter, you can directly select the available filter options such as Task name, Source language, Target language, Task status, Phase, and so on, then press **Enter** or click **Search**.

3. Click the **Filter color** drop-down arrow to add a color when you publish this filter as a saved search in the **Tasks** view.
4. Enter additional filter options into the fields to narrow or expand the range of tasks that you want to include in this filter.

   As you enter or select filter options, the number of tasks found displays on the bottom left of the **Advanced search** dialog.

Field	Action
All projects	The All projects radio button is selected by default. This option allows you to filter tasks from all projects.
Selected project	Select the radio button, then select one or more projects from the drop-down list.
Task name	Enter a task name. The task name must not include the following characters: \ / : * ? " < > |
ID	Enter a submission ID.
Word count	Enter the number range of the task word count.
Source language	Select one or more source languages from the drop-down list.
Target language	Select one or more target languages from the drop-down list.
File name	Enter a word or character string of a file name.

Field	Action
Priority Level	Select the priority of your filter based on its urgency. You can select a priority from three available options: • **Rush**—This is very urgent. • **Standard**—This is a standard priority. • **Low**—This is a low priority.
Task status	Select a task status from the drop-down list. Refer to Tasks—Status on page 5 for details on task status.
Phase	Select one or more workflow phases from the drop-down list.
Phase start date	Select the date range of the phase start date.
Phase due date	Select the date range of the phase due date.
Deadline	Select if the task is **Due soon** or **Overdue**.
Custom fields	This filter option is only available if it is set up for your project. Select one or more custom fields from the drop-down list, and enter the corresponding **Value**.

5. Press **Enter** or click **Search** to display your filtered tasks.
6. (Optional) Click **Save** to reuse the filter in the future.

   The filter is saved to the **Saved searches** list. The new filter is displayed at the end of the list.

> In the **Advanced search** dialog:
>
> - Click the **Track icon** to hide the filter from the **Tasks** view. Click it again to view the filter in the **Tasks** view.
> - Click the **Delete icon** to delete the filter.

- Drag and move the saved search to change the order of the filters.

In the **Tasks** view:

- Saved filters are displayed in the **Saved searches** pane of the Tasks view.
- Filters hidden from the **Tasks** view can only be seen from the **Advanced search** dialog.
- Select ⋮ on the top-right corner of a saved search to edit, clone, hide, or delete the filter.
- Drag and move the saved search to change the order of the filters.

Tasks—Quick filters

In the Tasks view, use the **Quick filters** icon in the column header to open the quick filter options. You can narrow your task search by entering a word or character string into the search boxes or selecting a checkbox. The quick filter options include the ID, Task, Status, Target, Batch, Priority, Phase, Phase start date, Phase due date, Words, or Files.

To use the quick filters in the Tasks view:

1. Click the **Quick filters** icon in the column header of your choice.

   The quick filter options are displayed.

2. Enter or select one or more filter options.

   As you enter a word into the search boxes or select a checkbox, the displayed task list updates dynamically.

   > Use the following options to clear quick filters:
   >
   > - Click the **Clear filter** link to remove the entered or selected filter option.
   > - Click on the top-right of the Task list, to clear all entered or selected filter options.

Review

This section describes basic supplier tasks. A task is a translation, review, or desktop publishing (DTP) job. You can view and manage tasks from the **Tasks** view.

In GlobalLink Enterprise (GLE), a translation or review project is defined as a submission. A submission consists of source files for translation, reference files, comments, and instructions. A submission includes one or more tasks depending on the chosen workflow, languages, and batches of files.

> For the purposes of this guide, basic tasks are actions absolutely required to advance a task to completion.

Claim a task

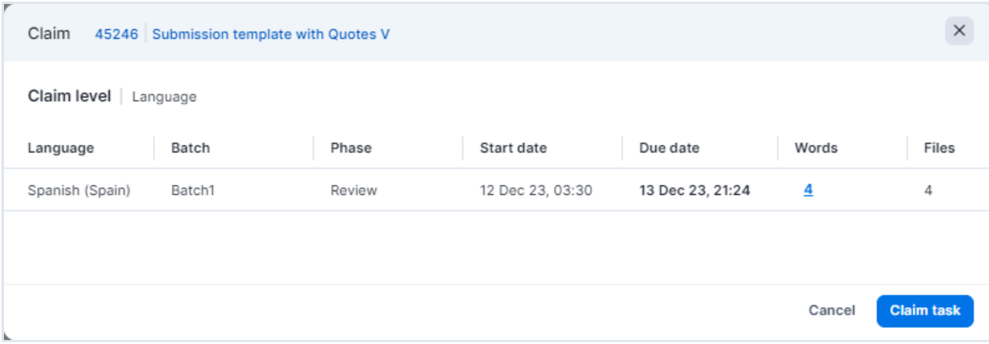
When the project manager creates a submission in GlobalLink Enterprise (GLE), you can view the submission tasks in the Tasks view. A submission can include multiple batches of files in different languages that require translation, review, and desktop publishing (DTP) tasks.

Your Tasks view displays each language, batch, and workflow phase as a separate task. For example, if a submission requires translation into 10 languages, you see 10 tasks. You must sign into GLE as a supplier to claim tasks in the Tasks view.

To claim a task:

1. In the **Tasks** view, select a task that has the **Available** status.
2. Select **Claim** in one of the following ways:
   - In the **Actions** column.
   - Right-click on the task.
   - In the **Manage** drop-down menu.

3. In the **Claim task** dialog, select **Claim task**.



The task is claimed. You can now open the task files in an online editor from the Task list.

> - If the task is not ready to be worked on, you can only reserve the task.
> - The **Claim task** dialog displays combined phases when you are assigned to work on different workflow phases such as Translation and Feedback implementation. The combined phases allows you to claim all of your tasks at once.
> - If an online editor is not set up for the task, in the **Claim task** dialog, a **Claim and open** button is available to download the files.

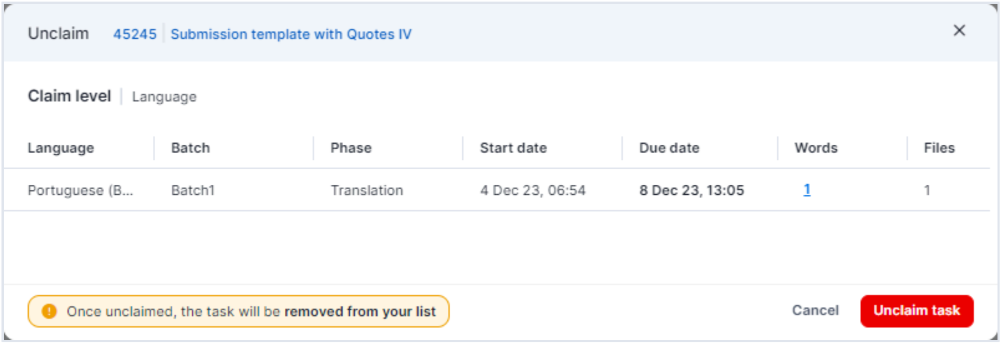
Unclaim a task

You can unclaim a claimed task if you are unable to work on it. Unclaiming the task removes it from your Task list, and makes it available for other users to claim.

To unclaim a task:

1. In the **Tasks** view, select a task that has the **Ready**, **Returned**, **In progress**, or **Reserved** status. Learn more about the Tasks—Status on page 5.
2. Select **Unclaim** in one of the following ways:
   - Right-click on the task.
   - Click the **Manage** dropdown menu.

3. In the **Unclaim task** dialog, select **Unclaim task**.



The task is unclaimed and removed from your Task list. The task is now available for other users to claim.

> The **Unclaim task** dialog displays combined phases because you were assigned to work on different workflow phases such as Translation and Feedback implementation. When you unclaim combined phases, all your tasks are unclaimed at once.

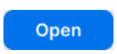
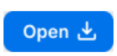
Open a task

After you claim a task, you can open task files in an online editor to translate or review the content.

To open a task:

1. In the **Tasks** view, select a task that has the **Ready**, **Returned** or **In progress** status. Learn more about the Tasks—Status on page 5.
2. Select **Open** in one of the following ways:
    - In the **Actions** column.
    - Right-click on the task.
    - In the **Manage** drop-down menu.

    The **Open** button displays in two ways depending on the task configuration:

	The task has an online editor configured.
	The task must be downloaded and worked on offline.

    The files open in the chosen editor or downloads based on the task.

Download task files

You can download task source files, reference files, GLP, and translation kits from the **Tasks** view.

To download files:

1. In the **Tasks** view, select a task, then do one of the following:
    - Right-click on the task.
    - Select the **Download** drop-down menu.

2. Select one of the following download options:
   - **Source files**—Select to download source files of the task.
   - **Reference files**—Select to download reference files and instructions of the task.
   - **All GLP**—Select to download the GLP file, word count analysis, reference files, and instructions of the task. The GLP file includes the source file, reference file, translatable file, and content.xml files. You can download a GLP file even when the task is not claimed.
   - **All kits**—Select to download the source files, translatable files, word count analysis, Translation memory connection, Glossary connection, reference files, and instructions of the task. You can download a kit only when the task is claimed.

   The files are downloaded to your computer in a Zip file. The ID, phase name, and download date and time are added to the Zip file name by default. The files are organized into subfolders based on target language and batch number.

Upload task files

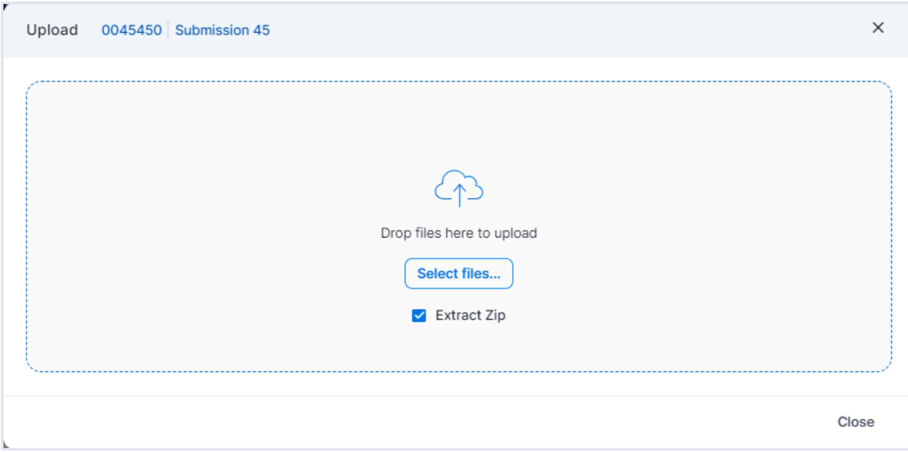
You can upload task files at any time while the task is **In progress**. This is useful if the localization project is done offline or if you want to upload auxiliary or native files with the translated files.

To upload files:

1. In the **Tasks** view, select a task that has the **Ready** or **In progress** status. Learn more about the Tasks—Status on page 5.
2. Select **Upload** in one of the following ways:
   - Right-click on the task.
   - In the **Manage** drop-down menu.
   - In the **Drawer**, go to the **Files** tab.

3. In the **Upload** dialog, click **Select files**, then select the file or files you want to upload.

   If your browser supports dragging and dropping files, drop files from your computer into the **Drop files here to upload** pane.

   The files are uploaded to the task, and an **Upload report** is displayed. The upload report provides the status of the uploaded file and the number of files. The available statuses are:

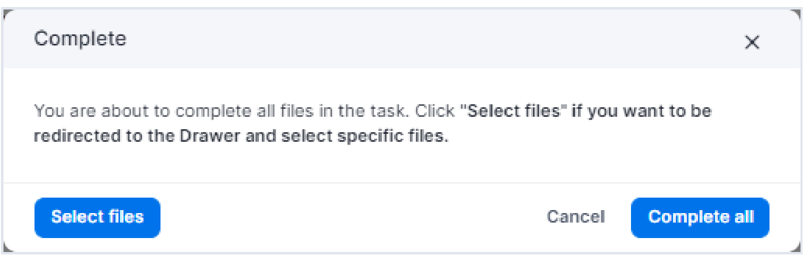
   - **Uploaded**—The file uploaded successfully.
   - **Failed**—The file upload failed. Click **Report** to view the Upload Error Description that details the error number and corresponding error message that can be used as a reference to fix the error.
   - **Ignored**—The uploaded file is ignored. This happens when the file is not part of the task. Ignored files do not have any errors.

Complete a task

Tasks can be completed manually by selecting the **Complete** action in the **Tasks** view or automatically when Instant phase completion is configured for the task workflow.

To complete a task manually:

1. In the **Tasks** view, select a task that you have finished working on. Learn more about the Tasks—Status on page 5.
2. Select **Complete** in one of the following ways:
   - In the **Actions** column.
   - Right-click on the task.
   - In the **Manage** drop-down menu.
3. In the **Complete** dialog, select the following options to complete the task:



   - **Select files**—Select to choose specific files to complete. This button opens the **Files** tab in the **Drawer** view. Select the files, then click **Complete**.
   - **Cancel**— Select to cancel the complete task.
   - **Complete all**— Select to complete all the files in the **Tasks** view.

> For linguistic tasks such as translation, the **Complete** button is available only when all files of the task are uploaded.

The task is completed.

> If Instant phase completion is configured in the task workflow, then the task is automatically completed after the work is done.