

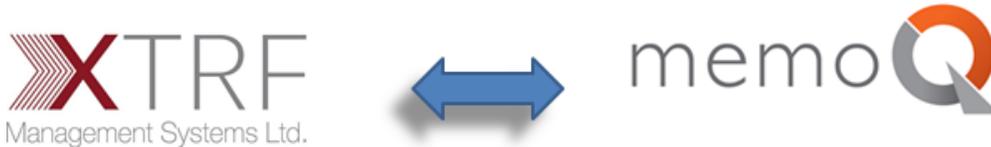
XTRF - memoQ Integration Card for Users

The objective of this document is presentation of the logic of the XTRF and memoQ integration and the structure of the processes synchronized or unified between two systems.

The Integration Card is prepared for advanced XTRF users, who understand the usage and the logic of working with XTRF. If any information

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General description - how to understand the integration

XTRF and memoQ integration can be divided into three groups of processes.

1. Quote Creation
2. Projects creation and management
3. Translation Memory files and Terminology files management

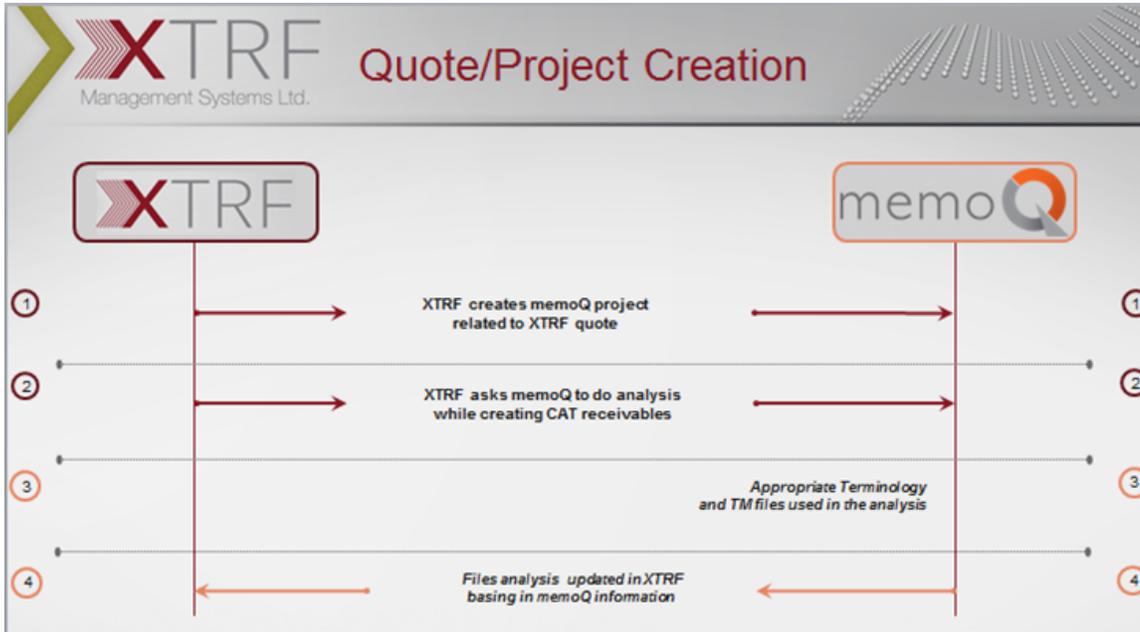
In addition, a common users management is a significant area of integration between these two systems.

Quote creation

Once the quote is created in XTRF a new relating project in Project in memoQ.

1. To create project in memoQ User must choose *Create Receivables basing on External System* button. Such action makes memoQ create analysis in background.
2. Depending on XTRF's and memoQ settings selected Translation Memory and Terminology files can be used for analysis.

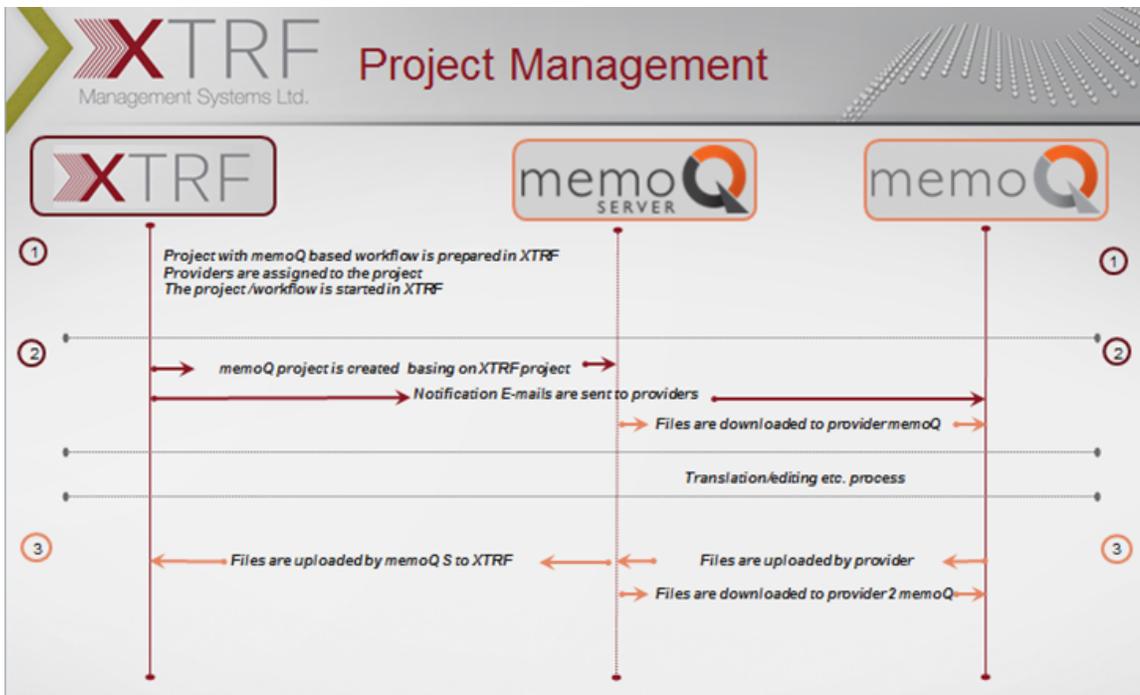
The picture below presents a simplified schema of XTRF <=> memoQ relation in quote creation and files analysis creation.



Project management

New projects can be created in memoQ basing on XTRF's quote or directly from XTRF's project. Depending on scenario, memoQ projects have names corresponding to XTRF's Quote number or Project number.

A simplified integration schema is presented below.



TM & Terminology files management

There are 3 types of both TM files and Terminology files. Types depend on the level of connection with client and the way of using it.

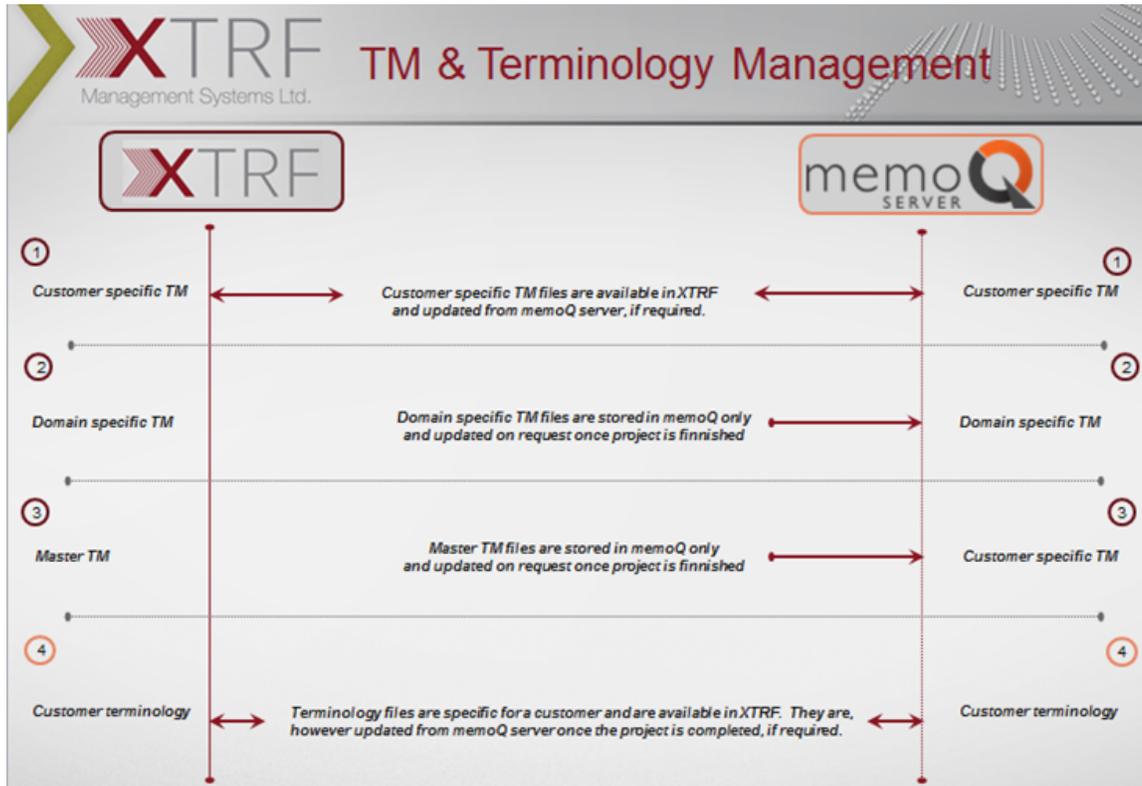
Customer specific TM and Terminology - TM and Terminology that is specific for a given customer's project or projects. Each customer may have

one or many TM and Terminology files used for his projects. Among them there can be always one **default** TM and one **default** Terminology file for language combination. Customer specific TM and Terminology files are manageable in XTRF, however they are stored in memoQ.

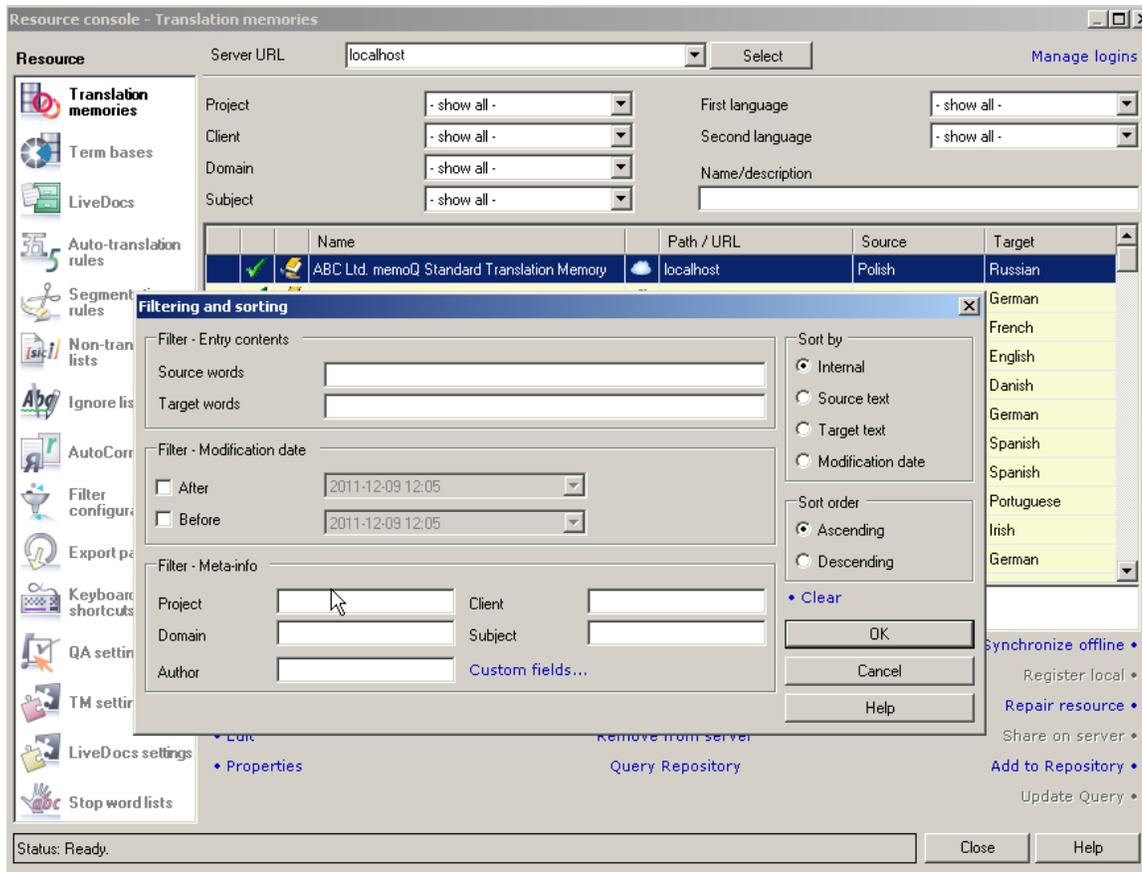
Domain TM and Terminology - General TM and Terminology files **belonging to** Translation Company specific for particular **Specialisation** (regardless the customer). It is stored and managed only in memoQ, however it is possible to use it in XTRF for the source files analysis and to update them once the project is completed.

Master TM and Terminology - General TM and Terminology files **belonging to** Translation Company (regardless the customer). It is stored and managed only in memoQ, however it is possible to use it in XTRF for the source files analysis and to update them once the project is completed.

Please take a closer look at the picture below presenting the differences between the types of Resources (TM and Terminology files)



The management and assignment of TM and Terminology files to a specific type is possible in memoQ only. The picture below is a screenshot taken in memoQ showing an example Translation Memory edition. Here you can decide whether TM is of Domain, Master or Customer specific type.



This is how to configure the type of Translation Memory or Terminology type:

1. If there is a CLIENT name typed in the field *Client* the TM or Terminology file will be for this Customer only. Otherwise:
2. If there is a name of Specialisation (XTRF) typed in field *Domain*, TM or Terminology files will be considered as DOMAIN type
3. If there is nothing typed in field *Client* and there is nothing typed in field *Domain* - a TM or Terminology files will be considered a MASTER type.

Fields mapping between the systems

Providers' fields

Once a provider is assigned to activity for the first time, its account is created in memoQ in TRANSLATORS memoQ group.

The following fields are mapped to memoQ.

XTRF field	mapping direction	memoQ field
providerName	=>	system account name
emailAddress	=>	email
phoneNumber	=>	phone
fullName	=>	fullName
address	=>	address
password	=>	password from XTRF

Project Managers' fields

The behaviour of Project Manager's data depends on the settings in XTRF configuration. You can find it in **System/Configuration/Integrations/External System**

Edit - External System - memoQ 5

Type	memoQ 4.5 * *
Name	memoQ 5 *
Webservice URL	http://192.168.0.16:8080/memoqservices/ *
Username	test *
Use Project PM	<input type="checkbox"/>
Auto Assign Master Translation Memories	<input checked="" type="checkbox"/>
Auto Assign Domain Translation Memories	<input checked="" type="checkbox"/>
Auto Assign Master Terminologies	<input checked="" type="checkbox"/>
Auto Assign Domain Terminologies	<input checked="" type="checkbox"/>

System user Project Management:

If the *Use Project PM* checkbox is **unticked**, all integrated projects have only one PM in memoQ. The **test** one in the example above. This user must be created in memoQ beforehand and belong to PROJECT MANAGERS

Integrated Project Managers accounts:

In order to map Project Managers' fields, make sure the *Use Project PM* checkbox is ticked. Once the new project or quote is created in XTRF, a new Project Manager's account is created in memoQ (unless it's already created). It is the same PM that is assigned to XTRF project or quote. This account is assigned to PROJECT MANAGERS group in memoQ

Fields mapping of Project Manager's account is the same as in case of Provider

XTRF field	mapping direction	memoQ field
userName	=>	system account name
emailAddress	=>	email
phoneNumber	=>	phone
fullName	=>	fullName
address	=>	address
password	=>	password from XTRF

Attachment