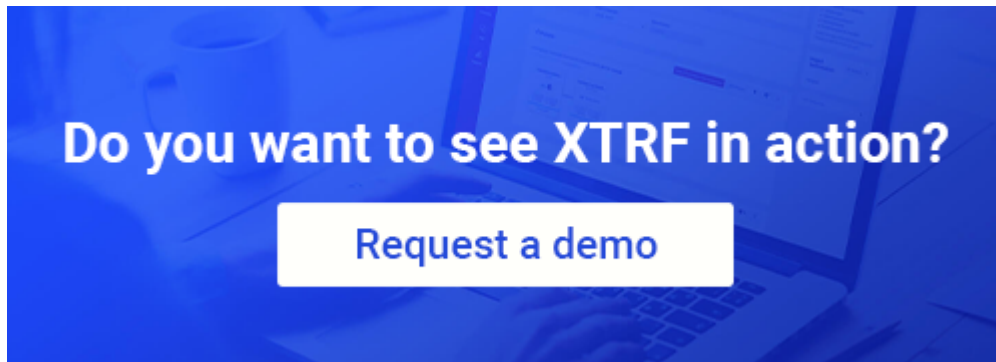


# User's Guides

Target audience: Home Portal's users



- 
- [Intro](#)
  - [User Roles in XTRF Language Business Platform](#)
  - [Get Started with XTRF Platform!](#)
  - [Use XTRF Platform on a Daily Basis](#)
  - [Configure Your XTRF Platform](#)
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## Intro

XTRF Language Business Platform is a highly customizable translation management system which takes the best power-features to get your translation projects finished successfully. Whenever you ask yourself how to figure out the minimum delivery time for your translation projects or how to assign your Vendors in the most efficient way, XTRF Platform helps you to get the fast and rock solid business solutions.

The below sets of guides outlines how the translation process may be conducted and mapped to specific user privileges within the process areas. If you want to do a general search for articles within a particular topic, you can do it as follows:

- From a user role perspective: going through the sets of articles presented in the [User Roles in XTRF Language Business Platform](#) section.
- From a functional perspective: browsing the lists of articles grouped in the following sections:
  - [Get Started with XTRF Platform!](#)
  - [Use XTRF Platform on a Daily Basis](#)
  - [Configure Your XTRF Platform](#)

## User Roles in XTRF Language Business Platform

When you have installed XTRF Language Business Platform you can find that there are predefined user roles. In the below guides the target audiences are defined according to the default system configuration settings. However, mind that the roles and permissions structure features are fully configurable: this allows to assign specific permissions to a group, therefore tune the access to different process areas. New access rights can easily be defined and then brought to life. The following set of guides familiarize audiences with the features and functionalities available for a given user role in a task-oriented manner. Enjoy!

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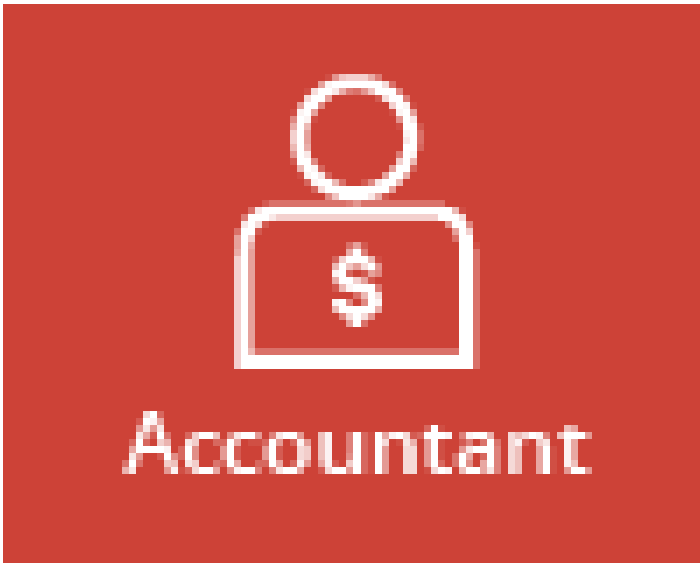
### Administrator



The administrator helps the translation agency's employees to configure the system they use. They can add and remove the Home Portal's users, decide about their permissions to the given components, customize system values, provide the administrator data to the system.

[Go to the Administrator's Guides](#)

### Accountant



The accountant is a person who maintains financial records in the localization company such as invoices or customer's and provider's payments. By default, this person gains access to the partners' price profiles or sets up the rates on the price lists.

[Go to the Accountant's Guides](#)

## Project Manager



The project manager is a person who gains control of the project workflow, so can easily manage translation tasks and jobs in the Home Portal. The project managers work very closely with the clients and vendors, therefore it is their responsibility to plan, execute, and close the translation project.

[Go to the Project Manager's Guides](#)

## Vendor Manager



The vendor manager is a person responsible for contact with your vendors. Vendor manager is looking for new vendors and at the same time maintains the relationship with your current vendors. This person updates and maintains all vendor related information, for example: vendor's price profiles or price lists.

[Go to the Vendor Manager's Guides](#)

## Sales

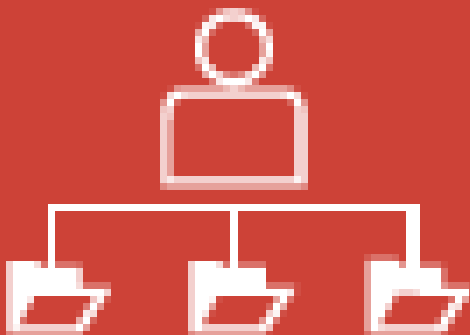


# Sales

The sales representative meets client needs offering and selling services. The sales is a person who works with clients to find the most strategic and well-thought-out solutions. In XTRF Platform one of the key responsibilities of sales representative is to prepare opportunities and quotes for clients where understanding of client culture and business needs is essential.

[Go to the Sales' Guides](#)

## Manager



# Manager

The manager is a person who makes decisions about the organization in the translation agency. By default, they can modify all settings in the Home Portal except for system configuration.

[Go to the Manager's Guide](#)

# Get Started with XTRF Platform!

Starting working with XTRF Platform in the right direction makes getting your results reliable and more productive. Without doubts. The below package of articles guides you how to set up the basic configuration to work with your XTRF Platform in the most convenient way.

What Are You Going to Do?	Target Audience	Description
Configure the basics of XTRF Business Language Platform.	Administrators	Go to the article to find out how to configure the key values in XTRF Platform. <a href="#">Go to the Configuring System Key Settings Guide</a>
Set up an outgoing e-mail configuration for proper work of the Home Portal.	Administrators	The article guides you how to configure an outgoing e-mail in the advanced Home Portal settings. <a href="#">Go to the Configuring the Outgoing E-mail in the Home Portal Guide</a>
Configure the basic system values, language.	Administrators	In the guide you can learn how to add the basic system values such as language. <a href="#">Go to the Configuring System Values: Languages Guide</a>
Configure the calculation units as the basic system values.	Administrators	In the guide you can find how to add the basic system values such as calculation units. <a href="#">Go to the Configuring System Values: Calculation Units Guide</a>
Configure the payment details.	Administrators	The article describes how to configure the basic payment system values used to create invoices. <a href="#">Go to the Configuring System Values: Payment Methods and Payment Types Guide</a>
Add new users to the Home Portal.	Administrators	The article presents how to create accounts for users in your company. <a href="#">Go to the Adding a New User Account in the Home Portal Guide</a>

## Use XTRF Platform on a Daily Basis

When your XTRF Language Business Platform is running, you can get your data in to accomplish your translation project goals. The following articles instruct you on different aspects of managing your translation projects in XTRF Platform.

What Are You Going to Do?	Target Audience	Description
Add Entities to the Database		
Add a new Client to the database one-by-one.	Project Managers	The article describes the manual client creation. <a href="#">Go to the Adding a New Client Profile to the Database Guide</a>

Manage a price profile for a new Client.	Project Managers, Accountants	In this article you can find how to: <ul style="list-style-type: none"> <li>• Create a new profile for your Client</li> <li>• Add a language combinations to the Client's profile</li> <li>• Add rates to the language combinations</li> </ul> <a href="#">Go to the Managing the Client's Price Profile Guide</a>
Manage a new price list for your Clients.	Project Managers, Accountants	In the article you can learn how to: <ul style="list-style-type: none"> <li>• Create a new price list</li> <li>• Add the language combinations</li> <li>• Add rated to the language combinations</li> </ul> <a href="#">Go to the Managing the Price List for Your Clients Guide</a>
Create manually an entry for your partner.	Project Managers, Vendor Managers	The article describes the manual Vendor creation. <a href="#">Go to the Adding a New Vendor Profile to the Database Guide</a>
Create and manage a price profile for a new Vendor.	Project Managers, Vendor Managers, Accountants	You can find out how to: <ul style="list-style-type: none"> <li>• Create a new profile for your Vendor</li> <li>• Add the language combinations</li> <li>• Add rated to the language combinations</li> </ul> <a href="#">Go to the Managing the Vendor's Price Profile Guide</a>
Create and manage a new price list for your Vendors.	Project Managers, Vendor Managers, Accountants	In the article you can read more how to: <ul style="list-style-type: none"> <li>• Create a new price list</li> <li>• Add the language combinations</li> <li>• Add rates to the language combinations</li> </ul> <a href="#">Go to the Managing the Price List for Your Vendors Guide</a>
Send an email to the Client with invitation to the Client Portal.	Project Managers	The article presents how to invite a client to the Client Portal. <a href="#">Go to the Inviting Your Client to the Customer Portal Guide</a>
Send an email within an invitation to the Vendor Portal.	Vendor Managers	The article guides you how to invite a person to the Vendor Portal. <a href="#">Go to the Inviting Your Vendor to the Vendor Portal Guide</a>
Work with a Localization Project		
Create a new opportunity or add an offer to an existing opportunity.	Sales, Project Managers	In this guide you can find a description how to: <ul style="list-style-type: none"> <li>• Create an opportunity from a scratch</li> <li>• Add a new offer to the opportunity</li> <li>• Send the offer to the client for an approval</li> </ul> <a href="#">Go to the Creating an Opportunity Guide</a>
Create a new Quote in the Home Portal.	Sales	The article describes how to create a Quote. <a href="#">Go to the Creating a Quote Guide</a>
Create a Project in XTRF Platform to start working with your Vendors.	Project Managers	You can find out how to: <ul style="list-style-type: none"> <li>• Create a Project</li> <li>• Add a language combination</li> <li>• Add costs to your Project</li> <li>• Add profits to your Project</li> <li>• Assign your Vendors manually</li> <li>• Start your workflow</li> </ul> <a href="#">Go to the Creating a Project Guide</a>
Ask your Vendors if they are willing to undertake a given Job.	Project Managers	The article presents how to assign your Vendors to a given activity. <a href="#">Go to the Assigning a Vendor within Availability Requests Guide</a>
Close your Project after finishing all activities.	Project Managers	You can find how to proceed to get all the activities done. <a href="#">Go to the Closing a Project Guide</a>

Create an invoice for your Project.	Accountants, Project Managers	You can learn how to create an invoice for completed Jobs. <a href="#">Go to the Creating an Invoice for Your Client Guide</a>
Create a report.	Managers	Find out how to create a report from scratch to address your data visualization needs. <a href="#">Go to the Creating a Report Guide</a>
Restore content in notifications.	Project Managers	The article instructs you how to restore default content of the notification templates. <a href="#">Go to the Restoring Default Content of a Notification Template Guide</a>
Link your Clients.	Project Managers	You can learn how to connect your Clients with each other, although they stay in different offices. <a href="#">Go to the Managing Client Offices Guide</a>

## Configure Your XTRF Platform

In today's business world things need to work smoothly , efficiently, and reliably - in a way that you are satisfied with the results. To optimize your project management process learn how to configure XTRF Platform going through the guides presented below.

What Are You Going to Do?	Target Audience	Description
Create a new view.	Administrators, Project Managers	Create a new view to preview and manage your data in the Home Portal. <a href="#">Go to the Creating a New View Guide</a>
Add a system value.	Administrators, Project Managers	<b>System values</b> are pieces of information that have an influence on your environment. The system values such as languages, payments or calculation units you should configure when starting to work with XTRF Platform; others you can define when you need more than the default ones. <a href="#">Go to the Configuring System Values: Job Types Guide</a> <a href="#">Go to the Configuring System Values: Specializations Guide</a> <a href="#">Go to the Configuring System Values: Discounts &amp; Surcharges Guide</a>
Add a new workflow.	Administrators, Project Managers	By default, you have the predefined Workflow Definitions in the Home Portal. However, you can add a new one which meets your needs. To learn how to create a Task Workflow Definition or Project Workflow Definition, go to the following guides. <a href="#">Go to the Creating the Task Workflow Definition Guide</a> <a href="#">Go to the Creating the Project Workflow Definition Guide</a>
Manage files in the newly created Workflow Definition.	Administrators, Project Managers	When you have added a new Workflow Definition you should know how to distribute files in it. The article gives you an example how to do it. <a href="#">Go to the Managing Files in Task Workflow Definition Guide</a>
Configure the Customer Portal.	Administrators	The article describes how to prepare the Customer Portal for your clients. <a href="#">Go to the Configuring the Customer Portal Guide</a>
Prepare Services for a Client.	Administrators, Project Managers	Services are a system value representing your translation process workflows in a marketing language. To find out more how define and manage Services in XTRF Platform see the below article. <a href="#">Go to the Services for Your Clients Guide</a>

<p>Add a Document Template to XTRF Platform prepared within BIRT-4 version software project.</p>	<p>Administrators, Project Managers</p>	<p>Templates are used to generate the final documents with a desired look and feel. Every time when you change the Document Templates locally, you need to add it to the Home Portal of XTRF Platform. The article below instructs you how to make the Document Template available in the XTRF Platform.</p> <p><a href="#">Go to the Adding BIRT-4 Type Document Templates Guide</a></p>
<p>Personalize a Document Template prepared within BIRT-4 version software project.</p>	<p>Developers</p>	<p>If you are familiar with the Business Intelligence and Reporting Tools (BIRT) version, you can adjust the Document Template available in the XTRF repository to your needs. To learn how to do it, follow the steps in the below guide.</p> <p><a href="#">Go to the Customizing Your BIRT-4 Document Template Guide</a></p>
<p>Generate an access token for a Home Portal's user.</p>	<p>Administrators, Project Managers</p>	<p>An access token is used to authenticate a user with an external application using the Home Portal API. Token based authentication is definitely more secure because the information is not stored on the server or in a session. To see how to generate the access token for a user read the below article.</p> <p><a href="#">Go to the Generating New Access Token for the Home Portal API Guide</a></p>

