Creating a Project Workflow Definition

Target audience: Project Managers, Administrators

- Create a Project Workflow Definition
- Tips and Tricks

A workflow is the step-by-step procedure necessary for successfully completing a given service. You just can define the sequence of activities in a very flexible way where different parts of the work is done by different vendors. You can assign the parts to each other in many different ways that the Workflow Definition, you are supposed to create, can closely follow the real translation scenario.
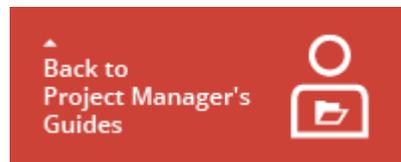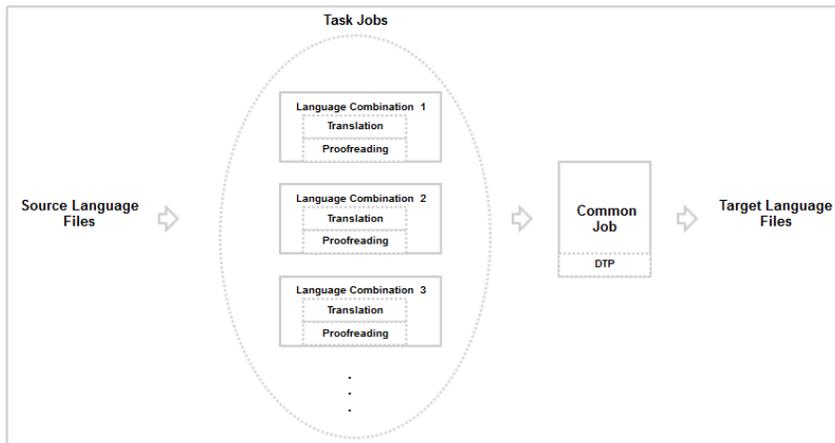
Before Reading a Tutorial
- The steps without any marking are mandatory to perform because they ensure carrying on a proper function of the Home Portal.
- The steps marked with the (Optional) label give you information about settings useful for you in terms of fulfilling specific requirements for your projects, but if you skip them it will have no negative effect on the function of the Home Portal.

Create a Project Workflow Definition

This section presents you how to define a project workflow for your translation projects. This way of managing the projects is strongly recommended when you have one job which is common for all other tasks and it can be performed only once in your translation process. For example, as presented in this guide, you can have a desktop publishing (DTP) job which is performed when all source files are translated for all language combinations. In this process the translation and proofreading jobs might be done by different vendors as well as DTP job might be performed by a vendor dedicated to this work. The diagram below presents how this translation process looks like:

To prepare an appropriate Workflow Definition for such a translation project, perform the following steps:

1.	Sign in to the Home Portal of XTRF Platform.
2.	Click the icon.
3.	Go to the Workflows > Workflow Definitions.
4.	Click the Add button.

5.	In the Create Workflow Definition display provide the following data:
	a. Select the Project Workflow you want to create from the Type dro p-down menu. b. Provide the name of the workflow in the Name field. The name should be unique to help your Project Managers distinguish it from other workflows. c. (Optional) Provide the information on the workflow definition in the Description text field. d. Check if the Active checkbox is selected. If the Workflow Definition is set up to active state, you can implement it further while creating a project. Otherwise, it cannot be use in your translation projects. e. (Optional) You can make this workflow as one of your favorite workflows in the Home Portal selecting the Preferred Item checkb ox. It is especially useful when the Project Manger creates a translation project because the project workflow will be displayed on the top of a project workflow list. f. (Optional) You can add this workflow as your default workflow defined in the Home Portal selecting the Default checkbox. Mind that only one Workflow Definition might be set as a default one.

Workflow Definition Types
To find out more about the differences between the Task Workflow and Project Workflow refer to the below articles:

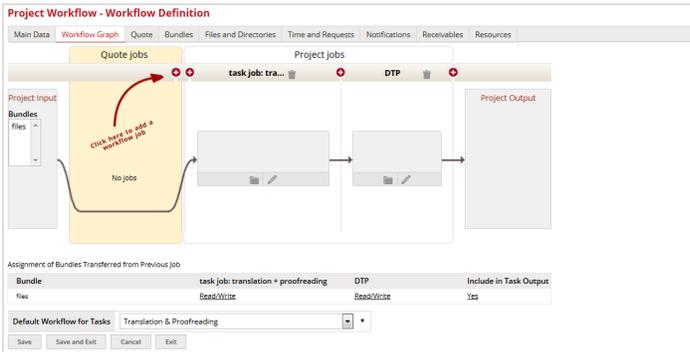- Project Workflow
- Task Workflow

6.	Click the Save button. You are redirected to your workflow definition display.
7.	Click the button to add a job in the Project jobs panel. The Workflow Job pop-up window appears.

|	

8.	In the Main Settings tab provide the following data:
	
	    a. For Workflow Job Type, select the Task Job radio button. This enables you to create a task which contains jobs for each translation task such as translation, proofreading, or quality assurance.
	    b. In the Name field provide a name of your jobs task.
	
	        Task Job Name
	        While providing a name of the task job please remember as follows:
	
	        • The task job name should be concise and short: this name will be displayed not only on the Workflow Graph but it will be also visible to your client and vendor.
	        • The task name should be unique.
	        • You can change this providing the name of the job in your project workflow.
	
	    c. Define the expression for your bundle with files in the Task Bundle Name field. By default, the `${task.displayName}` expression is provided. The bundles for each task will be generated with the defined expression. These bundles can be found in the Bundles of the project you will create applying the Workflow Definition you are preparing.
	    d. Select what kind of files bundle will be available in the task bundle from the Task Bundle Schema. For example, you can select the files schema therefore, in the project's job the files added to this schema will be available for vendors.
	
	    Bundles
	    To find out what the bundle is in XTRF Platform, go to the Bundle article.

9.	Click the Save button. The Workflow Job pop-up window closes. The newly created task job in your project workflow definition is visible in your workflow graph.
10.	Go to the Default Workflow for Tasks section and select which workflow will be processed in each task job. In this tutorial the Translation & Proofreading jobs are assigned to the task job created in the previous steps.
11.	Click the button to add a job in the Project jobs panel. The Workflow Job pop-up window appears.

12.	In the Main Settings tab provide the following data:
	
	    a. Check if the Simple Job radio button is selected.
	    b. From the Job Type drop-down menu select the type of your job which will be performed in the translation process. In this tutorial the DTP job is added to the project workflow.
	    c. In the Name field the job type name appears. You can change this providing the name of the job in your project workflow. The job name should be concise and short: this name will be displayed not only on the Workflow Graph but it will be also visible to your client and vendor.
	    d. In the Default Vendor section select one of the radio buttons depending if you want to assign a given person to the project workflow by default. If not, leave the None option selected.

13.	Click the Save button. The Workflow Job pop-up window closes. The newly created task job in your project workflow definition is visible in your workflow graph.

14.	Click the Save button at the bottom of your Workflow Definition display. You have created a Project Workflow whith one task job for translation and proofreading processes and one simple job for DTP process. This workflow you can apply to your project process.

A project sample with the defined Project Workflow

Within the Workflow Definition prepared in accordance to the steps shown above you can create a project where the translation and proofreading jobs are done simultaneously for different language combinations and, afterwards, the DTP job is set up to get performed.

⌄ Click here to see a sample of a project with the defined Project Workflow...
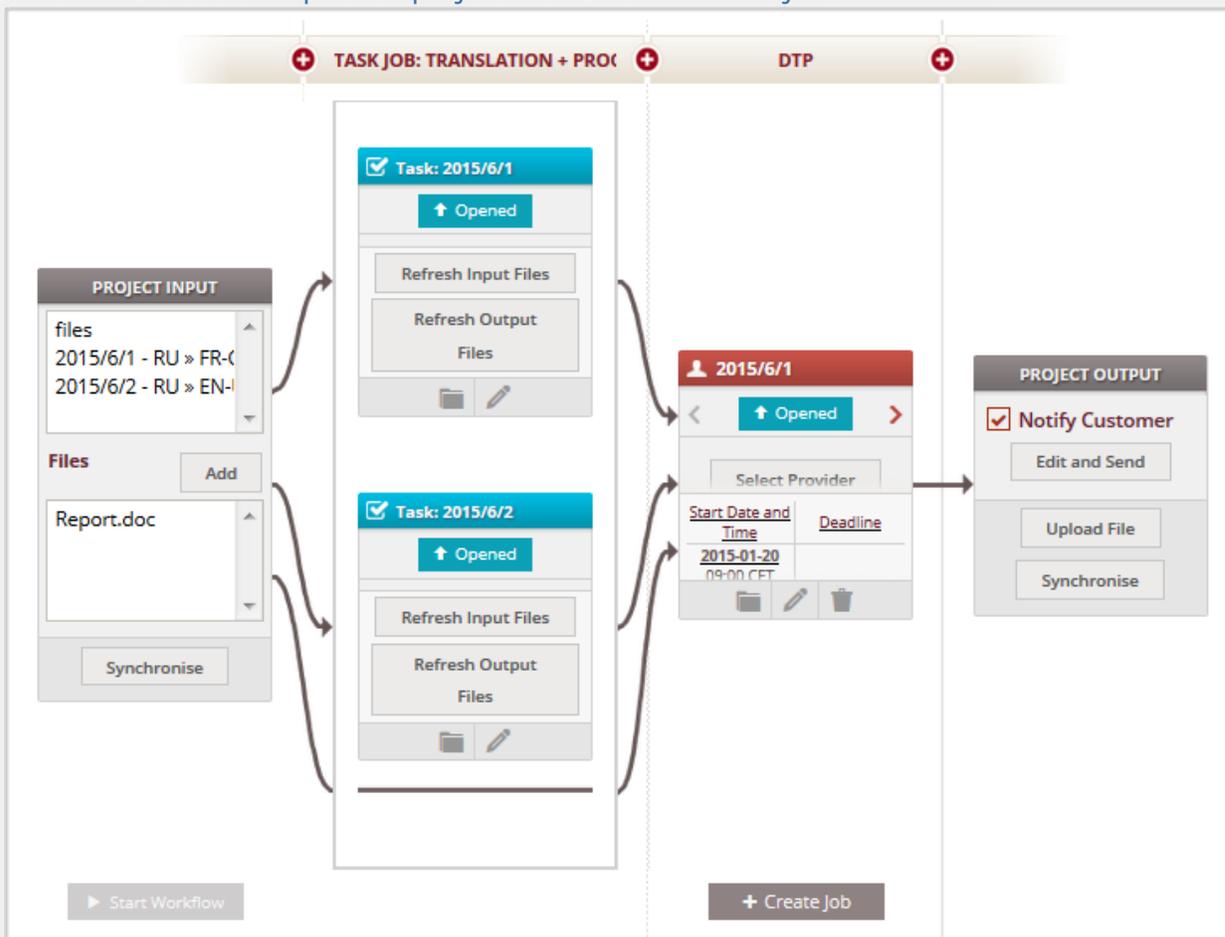
Tips and Tricks

To find some hints how to configure the workflow's structure
go to the FAQ page: Can I Customize a Workflow?