SimulTracker

Vendor Portal User Guide

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Contents

Document Control Revision History

Page	Details	Version	Author	Authorization	Release Date
All	New Document	1.0	Kenneth Larmer	Kenneth Larmer	20180424

SimulTracker Overview

SimulTrans has launched our new SimulTracker platform for managing and tracking translation and localization projects.

Powered by technology from XTRF, SimulTracker will interface with our translation memory tools to automate some processing of word counts and memory leveraging. This system is not replacing SimulTrans' highly competent, friendly, human project managers. We are committed to maintaining our high level of personal interaction with you.

We will continue to use and support other translation workflow tools, including Across, CloudWords, PhraseApp, Smartling, Transifex, WorldServer, XTM, and others, knowing these platforms are the preference of some clients.

You may also notice some changes to the format of SimulTrans' purchase orders.

SimulTracker also provides you with your individual portal, where files can be uploaded and downloaded. You may receive notifications from SimulTracker regarding delivery milestones and reminders, availability and tool requests.

Using specific client workflows, we aim to speed up the Translation/Editing/Proofing or Post editing phases, as well as allowing you a better view on incoming projects. Purchases orders will also be generated through the system, speeding up the current process.

Vendor Portal Overview

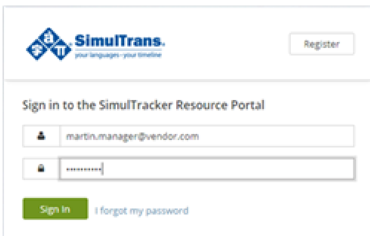
SimulTracker will replace our legacy internal project management platform while providing a helpful interface for you to interact with SimulTrans:

- Respond to new job offers and access job files in one central location.
- Upload deliverables through the portal.
- Receive purchase orders and to submit invoices with ease.
- Update profile information, including service, rates information, experience, payment method information and portal users and contacts.
- Notify SimulTrans about capacity and planned unavailability.

Accessing the Vendor Portal

1. Open the Vendor Portal sign-in page by opening the following URL in a web browser:
    - http://projects.simultracker.com
2. Enter your username/email address.
3. Enter your supplied password.
4. Click the 

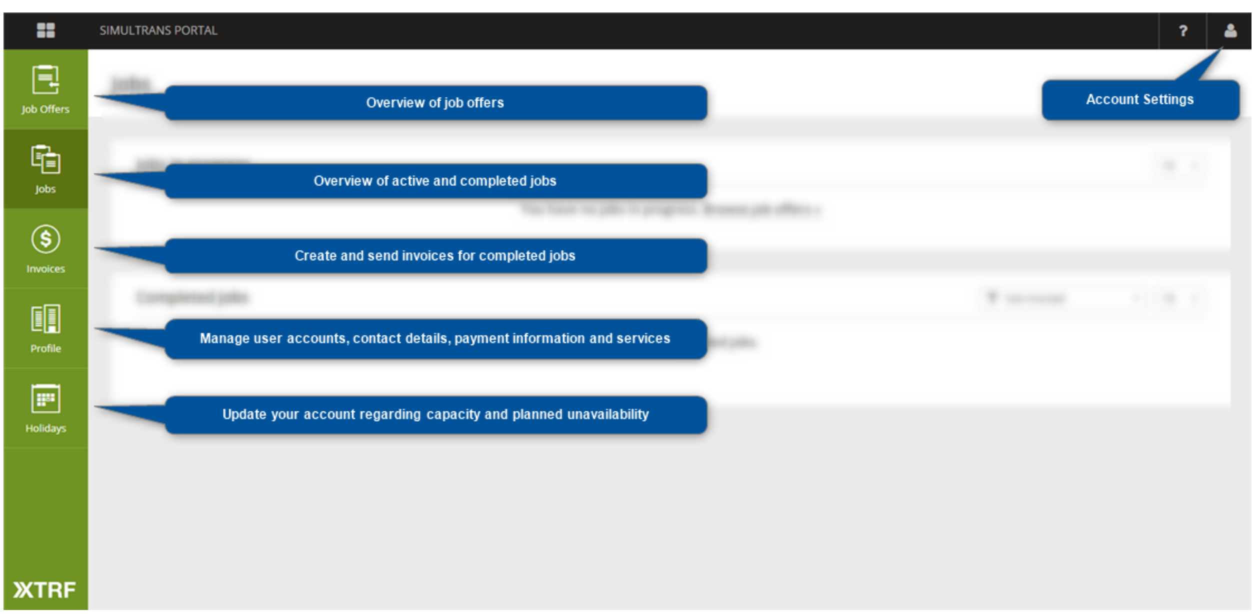
action button.



You can change the portal language locale by clicking on the language dropdown menu on the bottom right-hand corner of the login screen and selecting the desired locale from the list.

Vendor Portal Modules

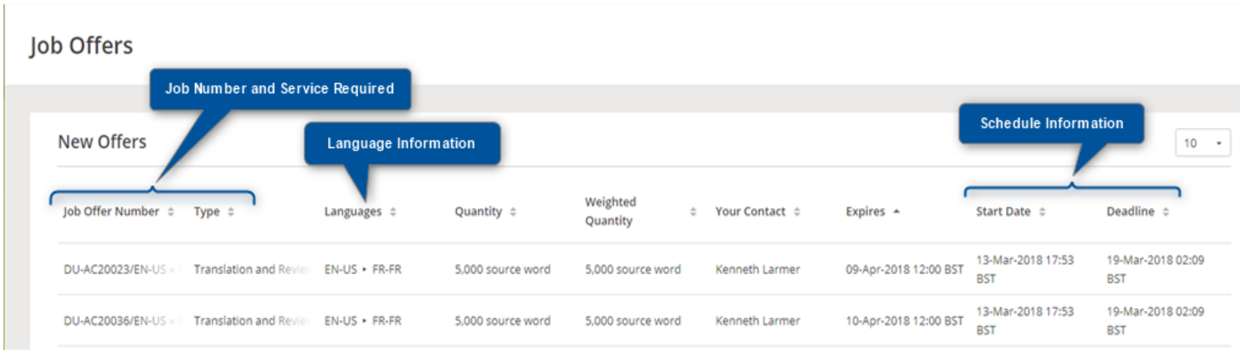
The Vendor Portal modules are displayed in the left-hand side menu bar. Use the module icons to navigate through the Portal.



Job Offers Module

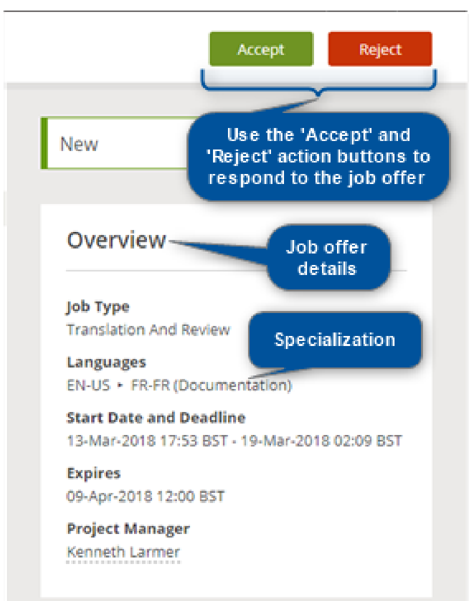
In the Job Offers module, users can view all current job offers. Job offers are essentially availability requests to see if you available to complete the scope of work outlined in the job offer.

SimulTracker will send an email notification, containing the specifics of the scope of work associated with the job offer.



How to preview and respond to a job offer

1. Click on the job offer to preview and respond.



2. Use the Accept Reject action buttons to respond to the job offer:

   - Click the Accept action button to confirm that you want to do this job and the time span is OK for you. SimulTracker will automatically send a notification to the relevant parties.

   - Click the Reject action button to reject this job offer. This offer will be removed from your list.

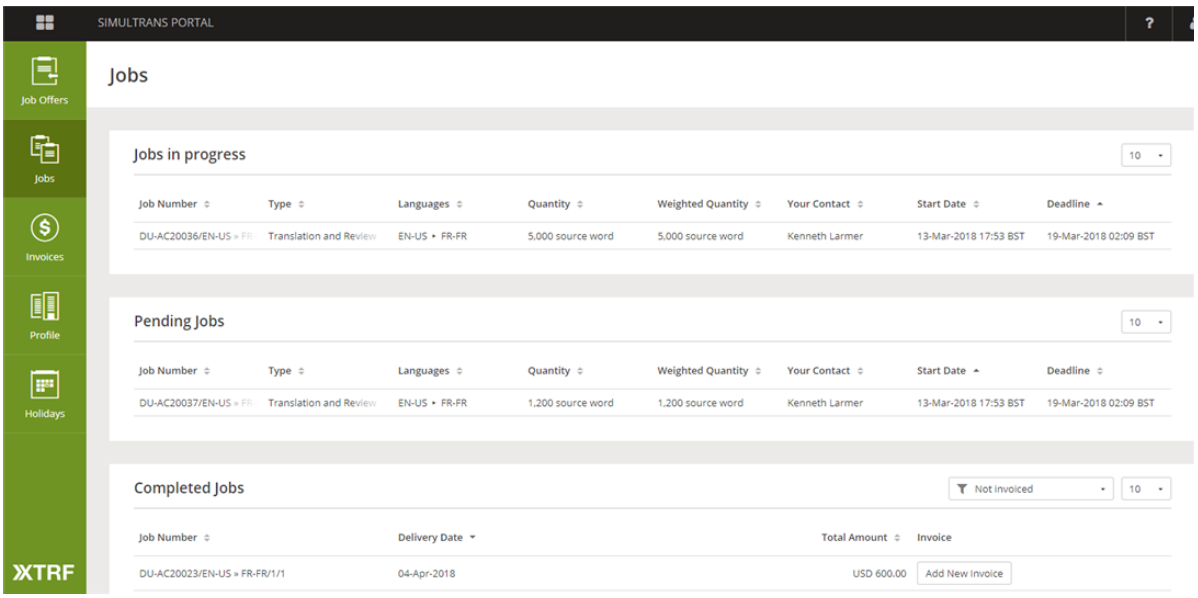
Jobs Module

The Jobs module is the default landing page after accessing the Vendor Portal.

The Jobs module enables users to browse, sort and display all pending jobs, jobs currently in progress and all completed jobs in one central, easy to navigate area.

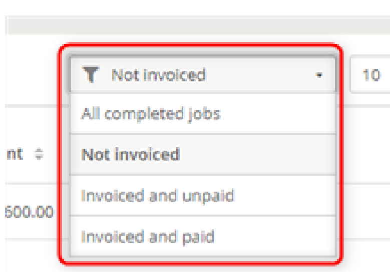
The module overview displays the key details in relation to the individual jobs, including the job number, service required, language information and schedule details (Start Date and Deadline).

The Start Date is the projected start time of the job. The Deadline is the time and date by which the jobs must be completed, and the deliverables uploaded through the Job Manager.



- **Jobs in progress:** Displays a list of jobs that are currently in progress.
- **Pending jobs:** Displays a list of jobs currently on hold or waiting on approval from the SimulTrans Project Manager.
- **Completed Jobs:** Displays a list jobs that have been completed, with the job deliverables uploaded through the portal, and the job status closed.

Completed jobs have an additional filter to toggle between filtered jobs by clicking on the filter dropdown menu.



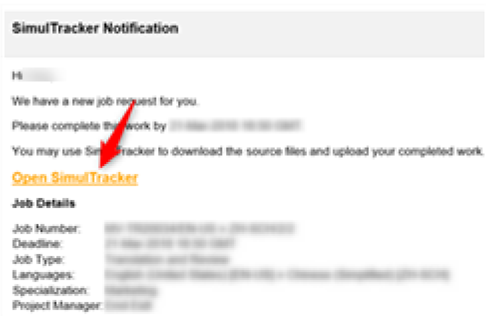
- **All completed jobs:** Returns a list of completed jobs, regardless of the invoice status.
- **Not invoiced:** Returns a list of completed jobs where the invoice has not yet been created.
- **Invoiced and unpaid:** Returns a list of completed jobs where the invoice has been created and submitted, but not yet paid by SimulTrans.
- **Invoiced and paid:** Returns a list of completed jobs where the invoice has been created, submitted and fully paid by SimulTrans.

Vendor contacts can access job details for any specific job by clicking on the required job in the Jobs module.

Jobs Manager

The Job Manager is part of the Vendor Portal and used to manage assigned jobs. Through the Job Manger, vendors can access source files, accept or reject jobs, access job specific details, and complete and deliver final deliverables for assigned jobs.

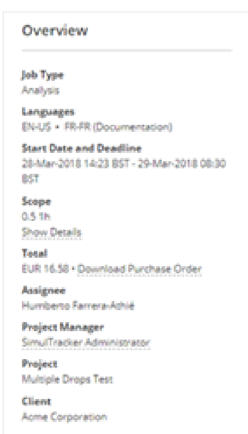
Assigned contacts can assess the Job Manager without registering their detail on the Vendor Portal by clicking on the Open SimulTracker link in the **New job request from SimulTrans** automatic notification sent from SimulTracker.



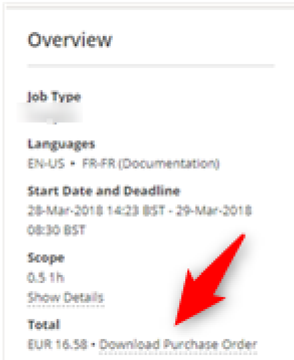
Using the Job Manager to access, review and complete assigned jobs

1. View the job overview, including service required, language information, specialization, start date and deadline information, assignee information, SimulTrans Project Manager information, project name and client name.

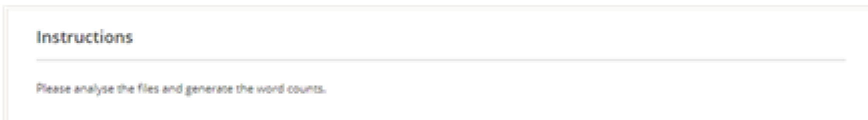
You can click on the SimulTrans Project Manager name link to easily create an email in relation to the job assignment.



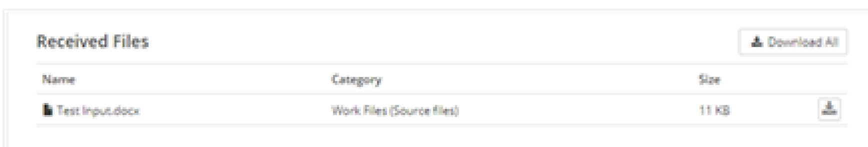
2. View and download the purchase order information using the Download Purchase Order link.



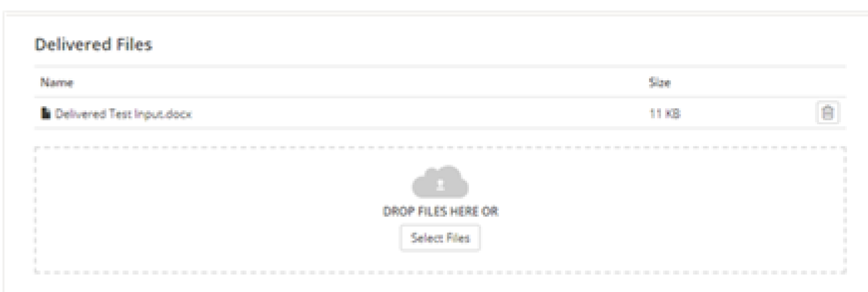
3. View and read instructions from your SimulTrans Project Manager.



4. Download source files and reference material to begin working on the assigned job with ease. Click on the file name or icon to download the file or use the Download All action button to download all the files in one handy ZIP package.



5. Upload final deliverables by dragging-and-dropping the target files from your file browser to the **Delivered Files** area or use the Select Files action button to navigate to the files location on your computer and upload.

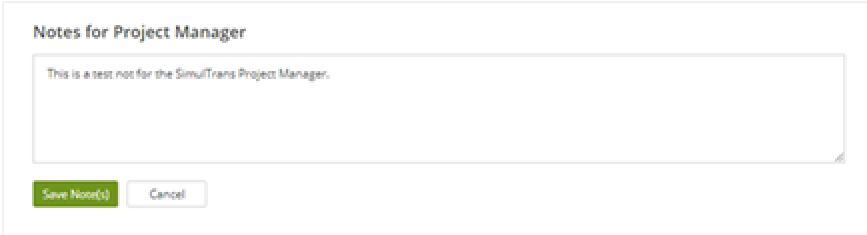


Please keep in mind that you cannot upload files where the filenames contain certain restricted characters.

The restricted character are as follows:

< > : ; " / \ | ? *

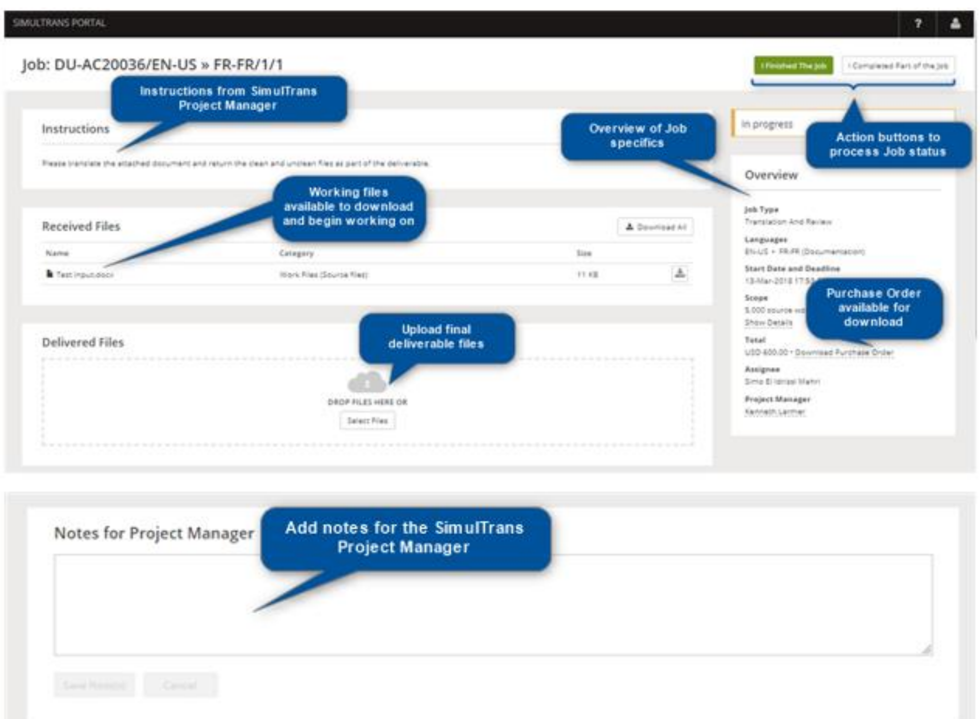
6. Exchange job-related information with your SimulTrans Project Manager by adding notes to the **Notes for Project Manager** field and clicking on the Save Note(s) action button.



7. Use the I Finished The Job I Completed Part of the Job action buttons to process the status of the job.

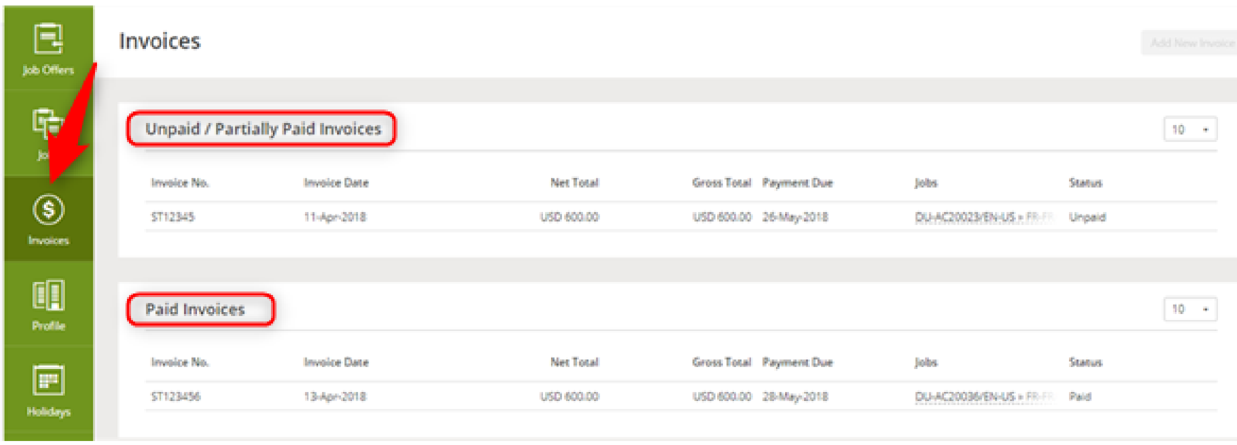
- Click the I Finished The Job action button when the job is completed, the final deliverables are uploaded, and you want to close the job. SimulTracker will send an automated notification to your SimulTrans Project Manager.

- Click the I Completed Part of the Job action button when you have partially completed the assigned job. SimulTracker will send an automated notification to your SimulTrans Project Manager.

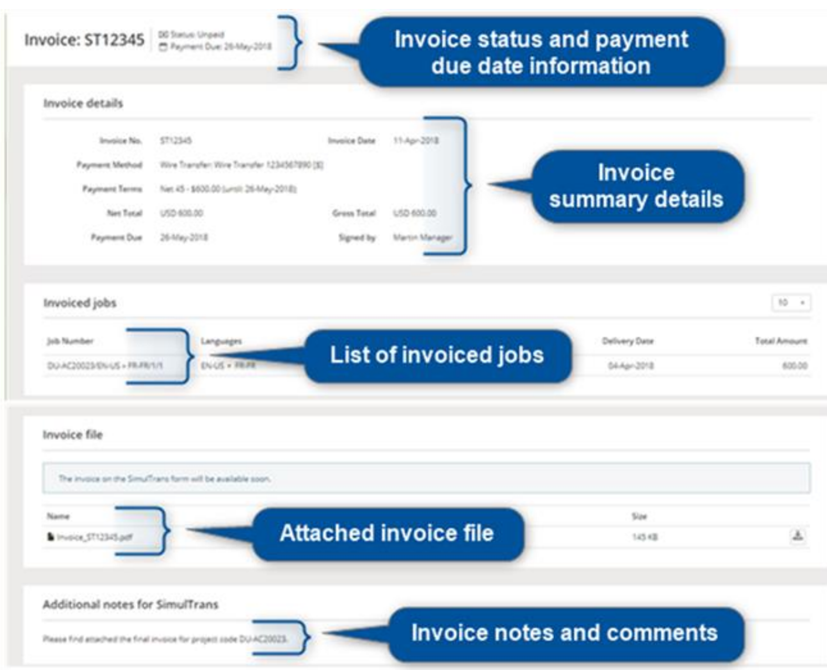


Invoices Module

Use the Invoicing module to create new invoices for completed jobs and monitor the payment status of submitted invoices.

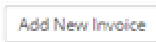


Click on an invoice to display the invoice details.



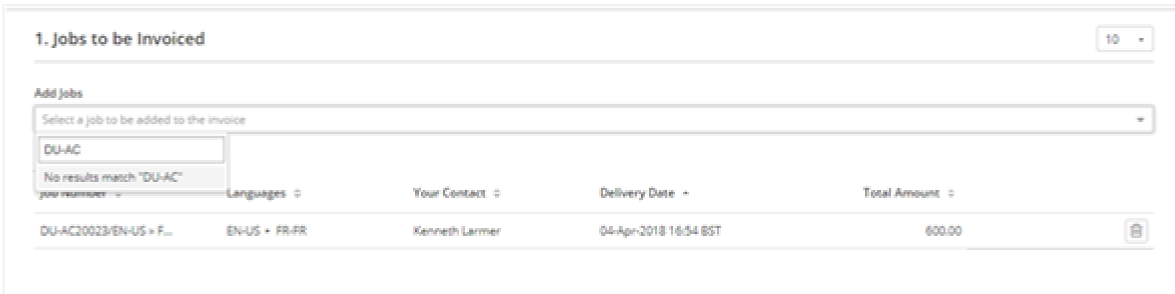
How to create and submit a new invoice

1. Click on the Invoices module.

2. Click the 

action button.

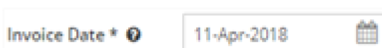
3. Add the jobs you want to be invoiced in the **Jobs to be Invoiced** section.



4. In the **Enter invoice details** section, enter the following information:

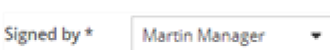
   - Enter the invoice number in the **Invoice No.** field.

   - Enter the invoice date in the **Invoice Date** field.



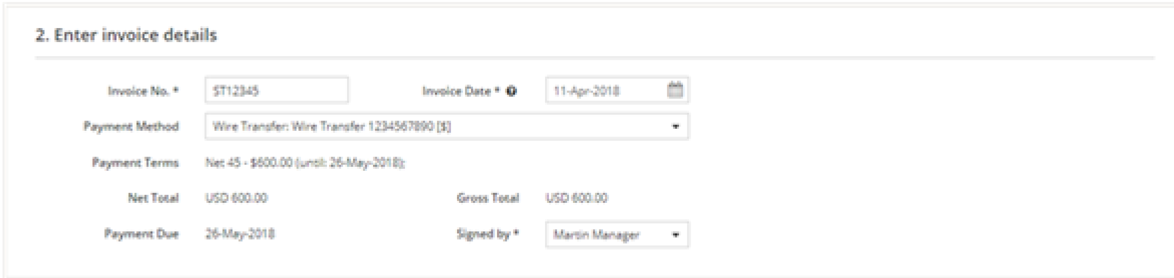
   - Select the payment method from the **Payment Method** dropdown menu (if applicable).

   - Select the invoice signee from the **Signed by** dropdown menu.

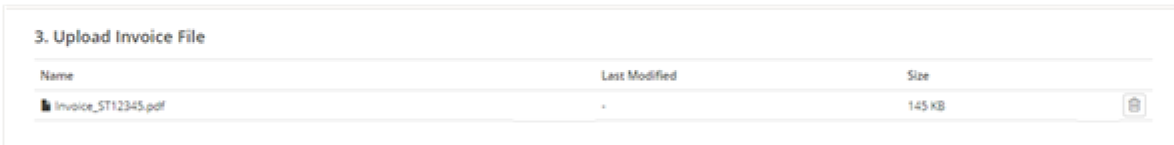


Payment Methods and contacts displayed in the Signed by dropdown menu can be managed in the Payments and Users sections of the Profile module.

The Payment Due date is calculated automatically according to the agreed payment terms agreed.



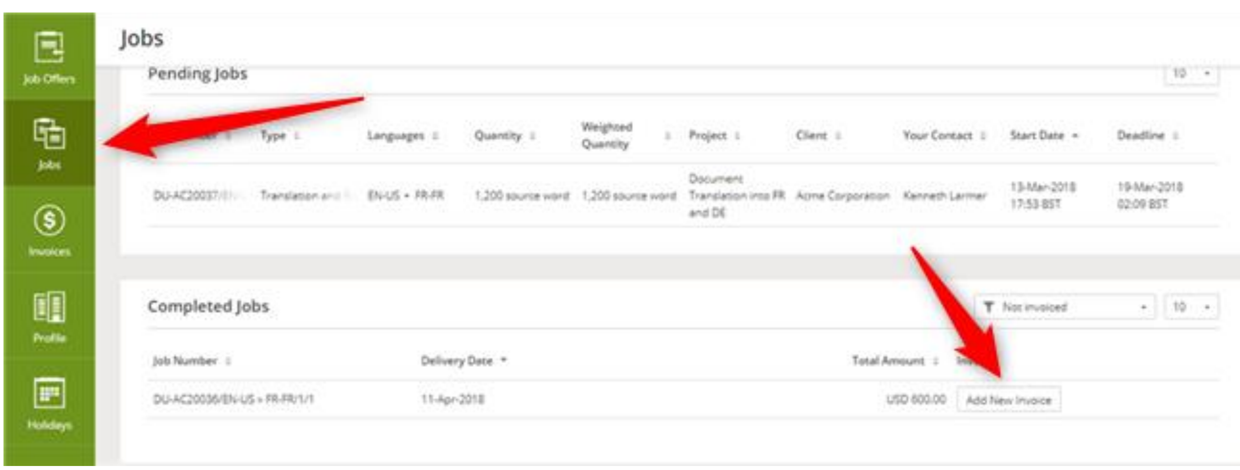
5. Upload your invoice file by dragging-and-dropping the files from your file browser to the **Upload Invoice Files** area or use the Select Files action button to navigate to the file location on your computer and upload.



6. Add additional notes by clicking on the Write additional notes for SimulTrans (optional) link and add the notes to the text field.

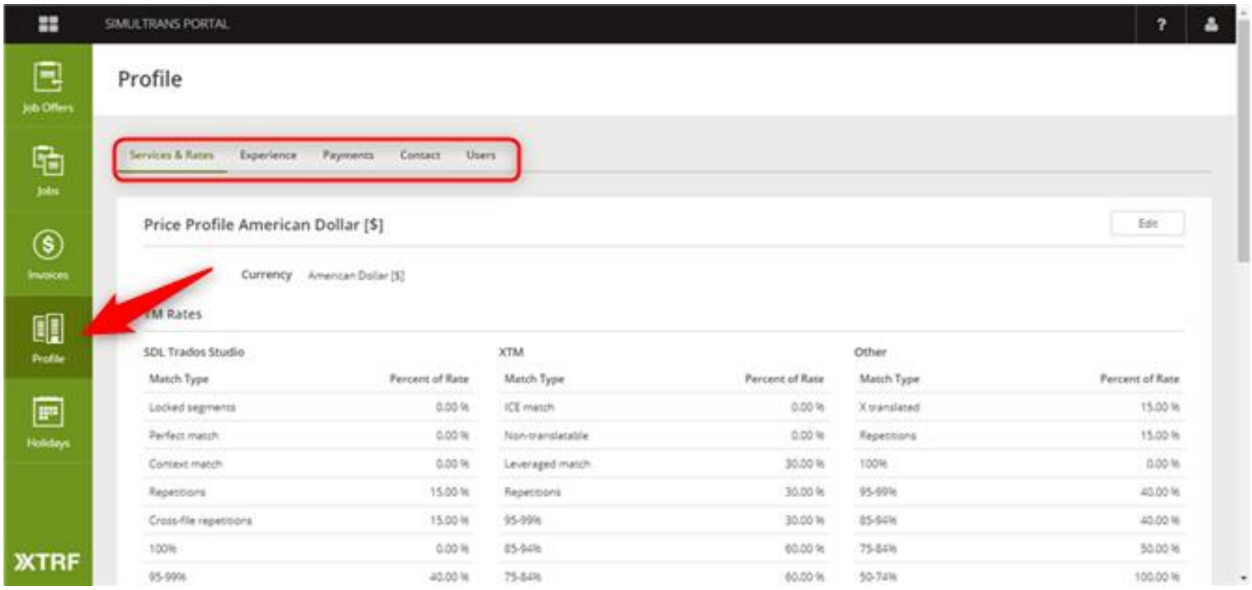
7. When finalized, click the Add Invoice action button to submit the invoice for processing and payment. SimulTracker will send an automated notification to the Finance Department.

You can also create invoices directly from the **Completed Jobs** section of the **Jobs** module, by clicking on the Add New Invoice action button beside the completed job that you want to invoice.



Profile Module

In the Profile module you can view and edit various elements of your professional profile.

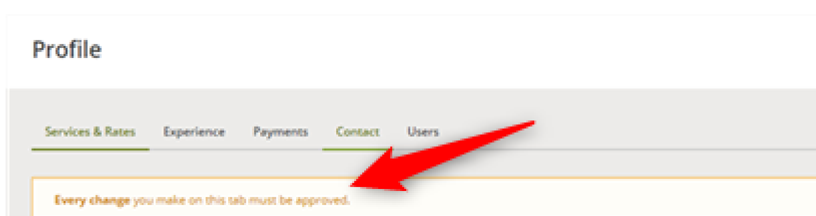


Resource Management must approve changes made to the following profile tabs:

- Services & Rates
- Experience
- Payments

How to edit and submit information in the Profile module tabs

1. Click the Edit action button in any of the Profile module tabs.
    - The following warning message is displayed if approval is required for any submitted changes.



2. Edit the information as required.
3. Click the Send change request action button to submit profile changes. SimulTracker will send an automated notification to Resource Management informing them that the profile was updated and requesting approval (if required).

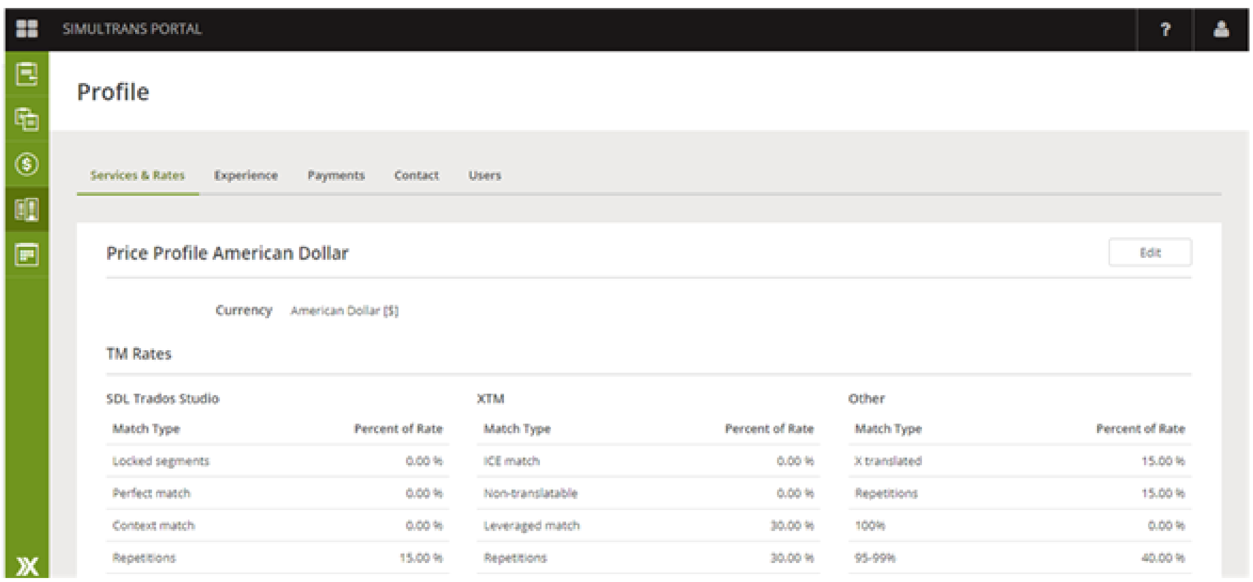
- If approval is required, SimulTracker will send a notification when the changes are approved by Resource Management and the updates will become visible in the vendor profile. If the changes are rejected, SimulTracker will also send a notification.

- Click the Discard action button to cancel all changes and leave edit mode.

- To cancel submitted changes, open the profile and click the Cancel change request action button.

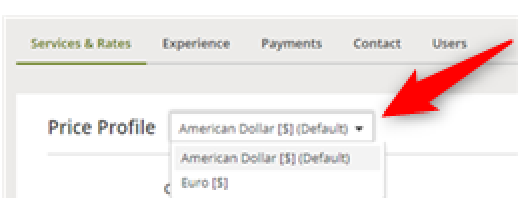
Services & Rates

Services & Rates tab lists all the services, rates information and calculation units information provided by a vendor.



If you have more than one active price profile, you can view and edit the services, rates information and calculation unit's information associated with the Price Profile by clicking on the **Price Profile** dropdown menu.

If the dropdown menu is not visible, it means that the account has only one Price Profile associated with it.



The grids listing the Translation Memory (TM) Match Rates, per CAT tool, are displayed at the top of the screen.

The percentage breakdowns are not editable through the portal so please contact Resource Management (resource.management@simultrans.com) through email, if changes are required.

Editing is not allowed. Let us know, if something is wrong with TM Rates.

SDL Trados Studio

Match Type	Percent of Rate
Locked segments	0.00 %
Perfect match	0.00 %
Context match	0.00 %
Repetitions	15.00 %
Cross-file repetitions	15.00 %

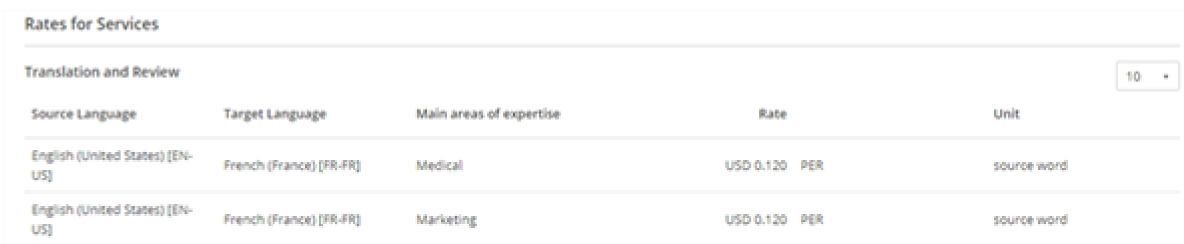
XTM

Match Type	Percent of Rate
ICE match	0.00 %
Non-translatable	0.00 %
Leveraged match	30.00 %
Repetitions	30.00 %
95-99%	30.00 %

Other

Match Type	Percent of Rate
X translated	15.00 %
Repetitions	15.00 %
100%	0.00 %
95-99%	40.00 %
85-94%	40.00 %

The **Rates for Services** section lists all the agreed and qualified language combinations, specializations and individual rates per calculation units offered to SimulTrans.



Rates for Services

Translation and Review

10

Source Language	Target Language	Main areas of expertise	Rate	Unit
English (United States) [EN-US]	French (France) [FR-FR]	Medical	USD 0.120 PER	source word
English (United States) [EN-US]	French (France) [FR-FR]	Marketing	USD 0.120 PER	source word

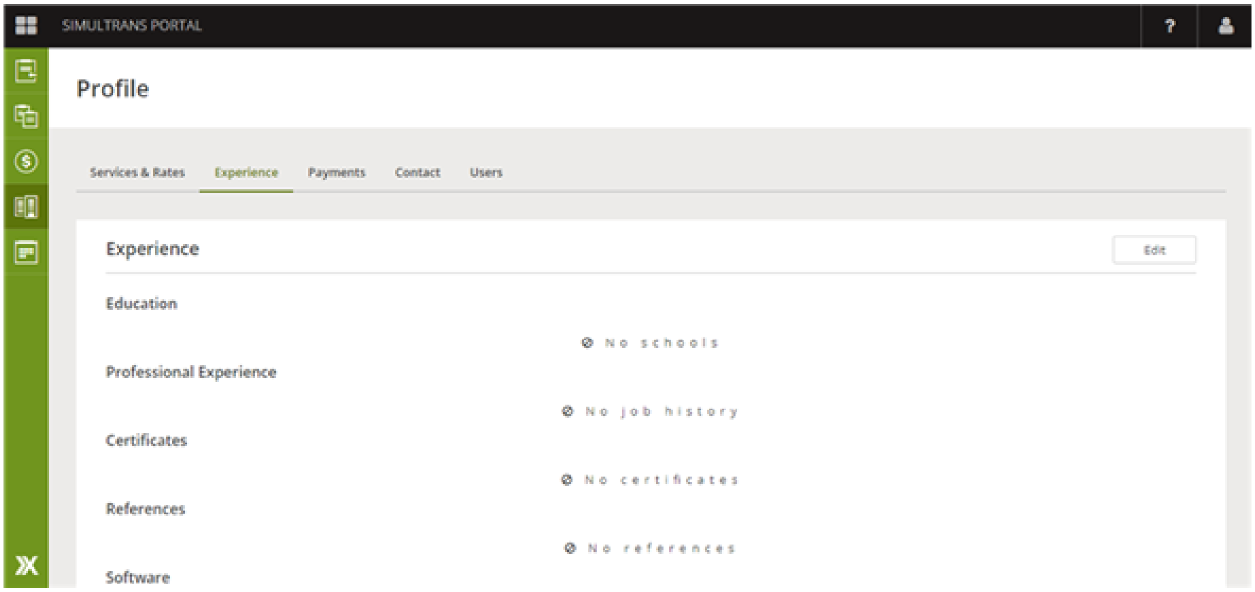
Please contact Resource Management (resource.management@simultrans.com) before modifying the data listed under the Rates for Services section, including adding/deleting language combinations, updating rates or adding new services.

Resource Management must approve any submitted changes before they are applied to SimulTracker.

Experience

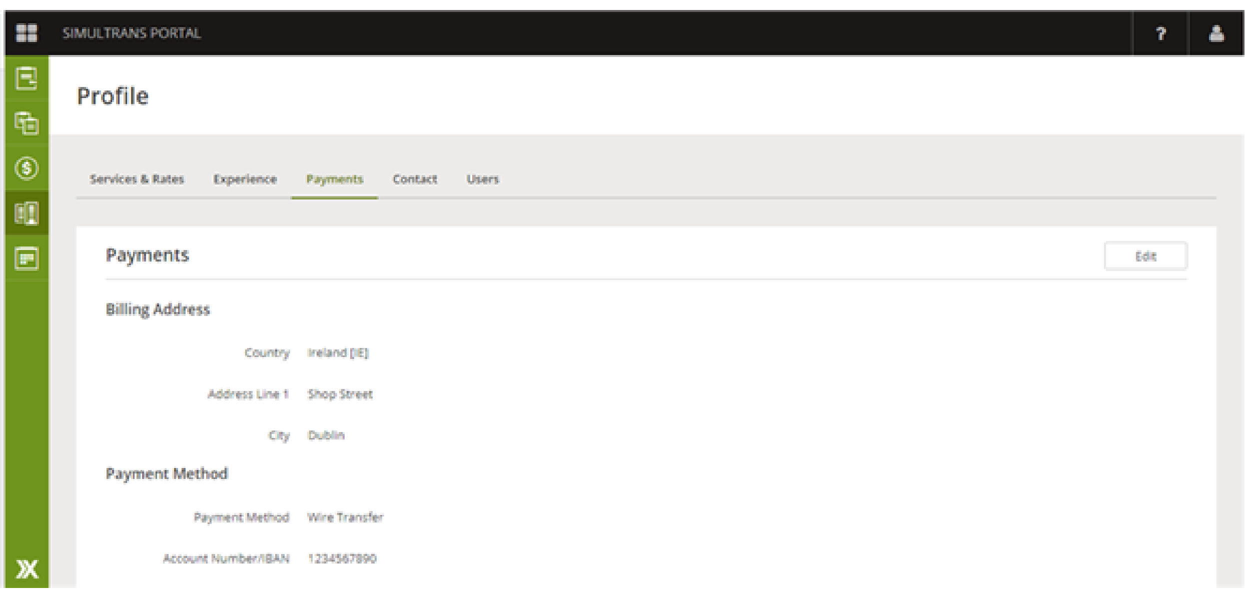
The Experience tab is where the details about your education and previous experience can be stored.

The Experience tab is only visible for freelancer profiles but not agency/company profiles.



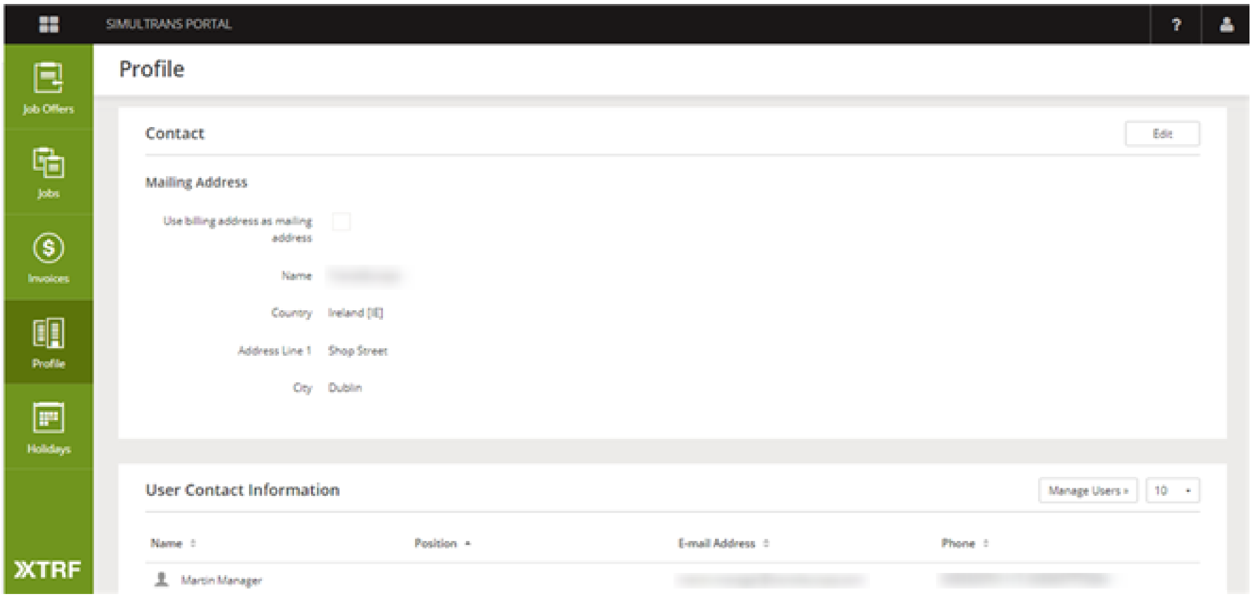
Payments

The Payments tab stores billing address information and your company's preferred payment method and details.



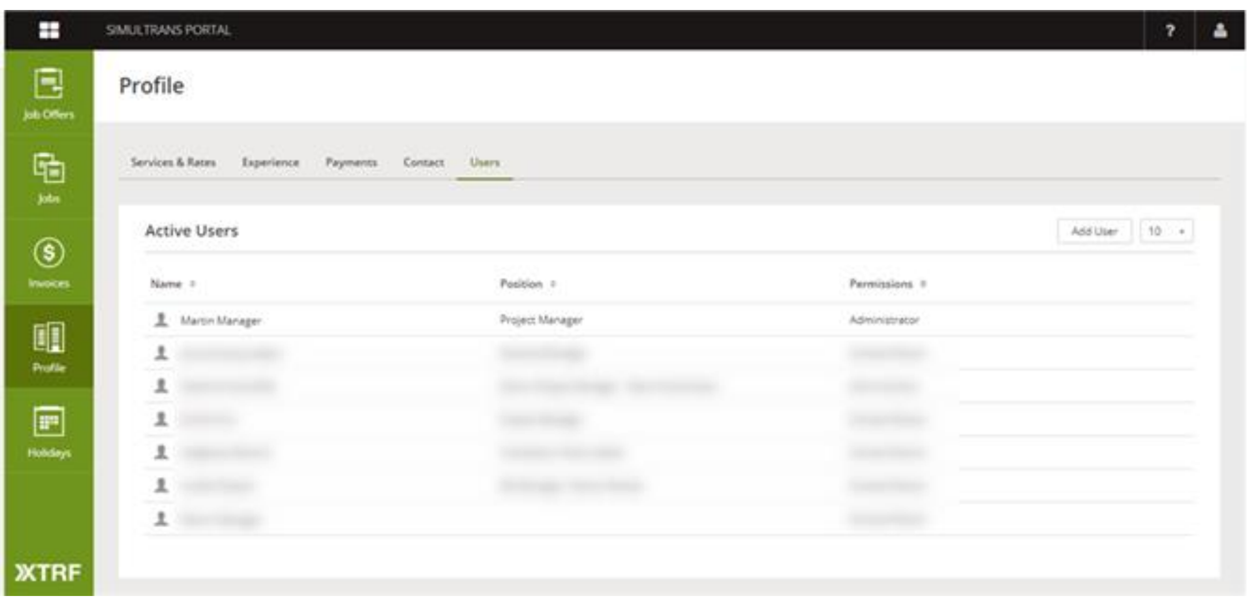
Contacts

The Contact tab stores the mailing address information and the portal user's information, including name, position, email address and phone numbers.



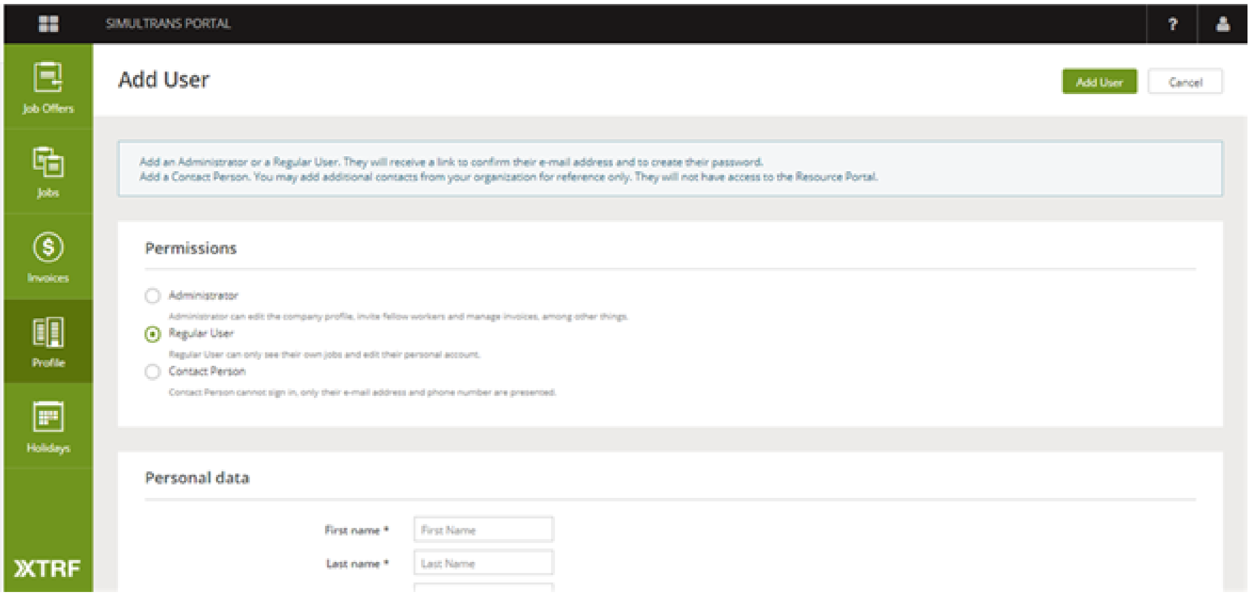
Users

The Users tab is where the profile administrator(s) manage the profile users and contacts from.



Adding new users

1. An Administrator can add new users by clicking on the Add User action button or edit an existing user by clicking on the name in the **Active Users** section.

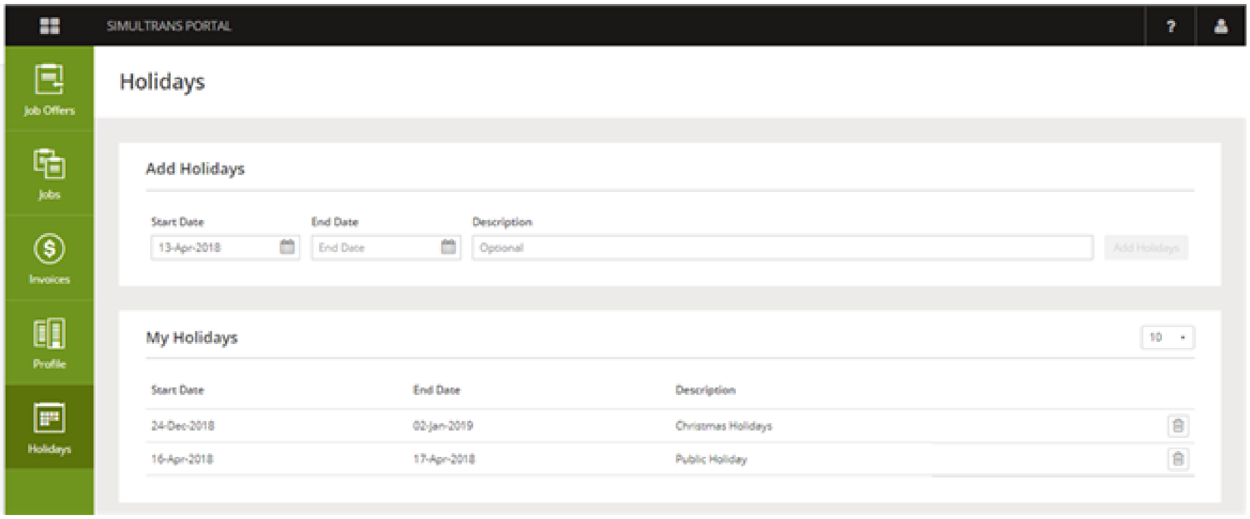


2. Users can be assigned Administrator, Regular User or Contact Person permissions.

3. SimulTracker will send an automated notification to the new users, asking them to confirm their email address.

Profile Module

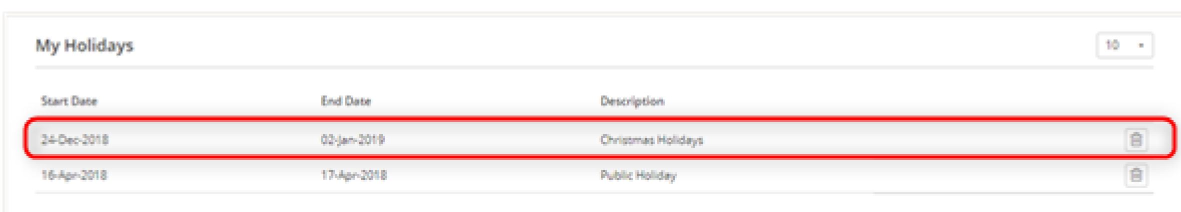
In the Holidays module, you can add dates when you are unavailable for projects.



How to add a date of unavailability

1. Select the start date in the **Start Date** field by clicking on the helper icon.
2. Select the end date in the **End Date** field by clicking on the helper icon.
3. Enter a brief description in the **Description** field.
4. Click on the Add Holidays action button.

When added, the unavailability dates will be displayed in the **My Holidays** section.

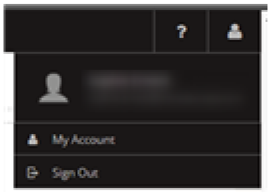


Unavailability dates can be sorted and deleted but they cannot be edited.

Portal Settings

Portal users can use the Portal Settings to update personal information or sign out of the portal.

Click the icon in the top right-hand corner of the window to access the Portal Settings menu.



- In the **My Account** settings, users can view or update personal information related to their account, including name, position, portal interface preferred language, preferred contact language, password, email address information and phone number information.

- Click 

to sign out of the portal.

Additional Help Resources

Listed below are links to some helpful videos about the Vendor Portal:

Title	Link
Activating your Vendor Portal account	https://youtu.be/W6aRT77wpgQ
Creating an invoice through the Vendor Portal	https://youtu.be/Y_Pbn95aATU
Vendor Portal User Guide	https://www.youtube.com/watch?v=2WSXB9snNx8
Vendor Portal Webinar by XTRF	https://www.youtube.com/watch?v=TfTBVE99_aw

Contact SimulTrans

If you have any questions or require further assistance, please contact Resource Management or SimulTracker Support:

Contact	Email Address
Resource Management	resource.management@simultrans.com
SimulTracker Support	simultracker@simultrans.com