OCLanguage 7.0 documentation

Riga, 2017

Contents

1. About OCLanguage

The idea of developing a single platform for supervising translation agency management process was born in Riga (year 2007). SIA "OCL" worked 2 years in close cooperation with a few European translation agencies to release first version of the software in 2009. Today our system is one of the most popular solutions in the world, having a lot of unique features to cope with translation agency tasks. OCLanguage consists of CRM, project and vendors' management, sales and statistics reports and wide set of business monitoring features.

The solution is based on Web technologies, which allows users to access the system any time from any location. OCLanguage is recognized as user-friendly, easy to modify and reliable solution for TAs. Today OCLanguage has Customers and partners in CIS and CEE regions. The main course of action is selling one time purchase solution along with the modification of it according to every TA needs. As well, Customers tend to purchase the system as Software-as-a-service (SaaS) solution.

OCLanguage is a warranty for those who value efficiency, strive for innovations and seek for business processes improvements on daily basis.

Our vision – we will be recognized as a leading software solutions supplier for Translation Agencies worldwide.

Our strategy is based on the following cornerstones:

1. we are a company with a Customer driven approach;
2. we collect the ideas from our Customers to add new system modules, which ensures that OCLanguage has translation business specific functionality only;
3. our outstanding experience and striving for perfection allows us to deliver maximum value of OCLanguage solution to every Customer.

2. What is CRM

CRM (Customer Relationship Management) – corporate information system, which is purchased with a purpose to improve quality of services, to optimize marketing activities and increase sales revenue. Companies are looking for solution that would allow to save money, but increase efficiency. Let us emphasize just a few benefits of CRM system:

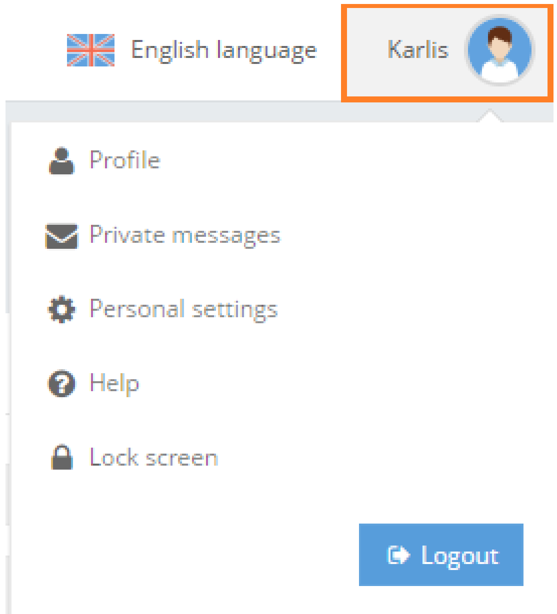
1. CRM system has full information about the Customer – this allows management to allocate proper amount of resources for handling particular tasks
2. CRM system represents tool for managing marketing related data – analysis and actions planning
3. Automatized sales process – automatic operations management and control over orders being processed
4. Continuous analysis of cooperation with Customers – setting priorities, based on importance and weight of action impact on the company
5. Decreased response time to quote requests
6. Contact management
7. Time management
8. Reporting for top management and human resources management
9. Integration with third-party systems etc.

OCLanguage has all aforementioned CRM features, besides that it represents the tool with many unique translation management features, which lead to finance and time savings and increased profitability. All orders in system are handled according to OCLanguage workflow, which includes translation quality management and one-click translated document-sharing option with Customers.

3. System configuration management

3.1. Session information

After logging into the system, one can browse user information by clicking on “User” icon. The system will reveal the following data:



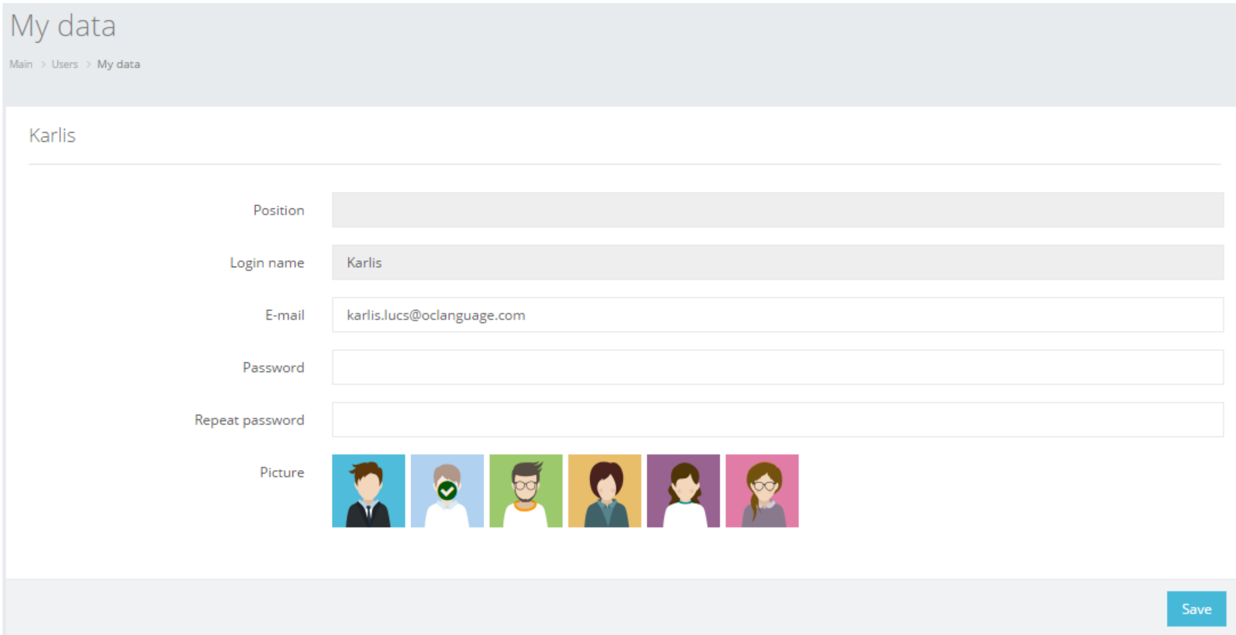
When clicking each of options, the system opens the specific section.

1. Profile

In this section the user can do the following:

- change e-mail address;
- set a new password;
- change his avatar.

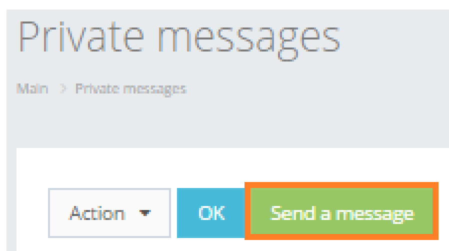
! Please note that fields in grey color are not editable.



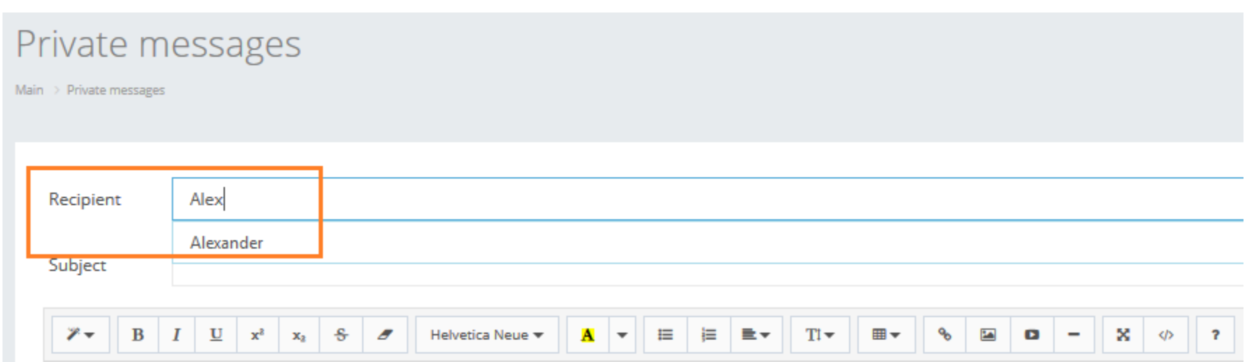
2. Private messages

In this section the user can do the following:

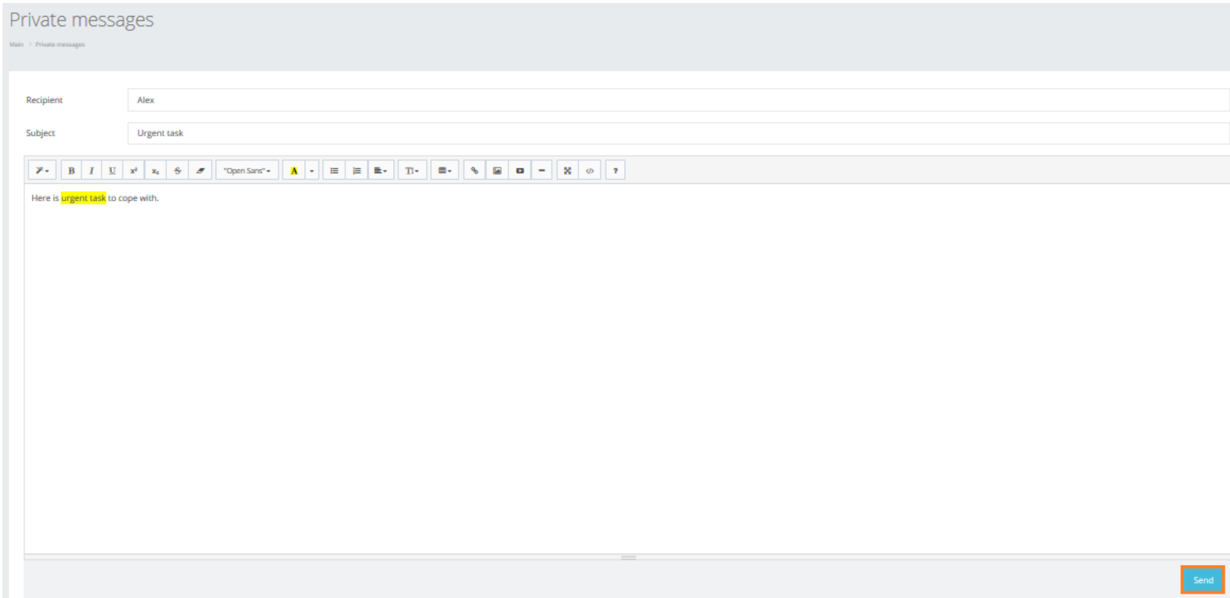
- Create a new message by clicking “Send a message”.



Start typing user name and the system will reveal all usernames that have typed letters:

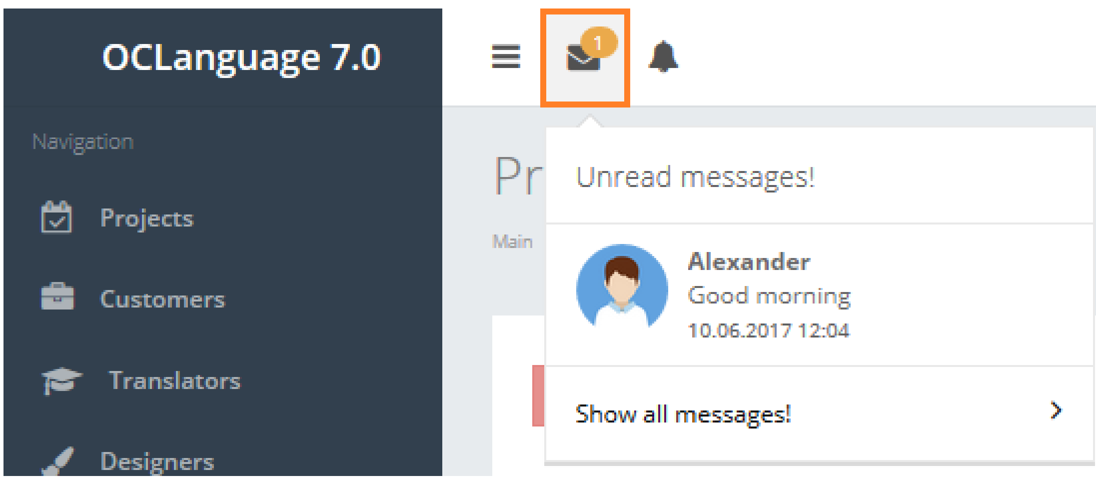


Click “Send” to send a message to the recipient.



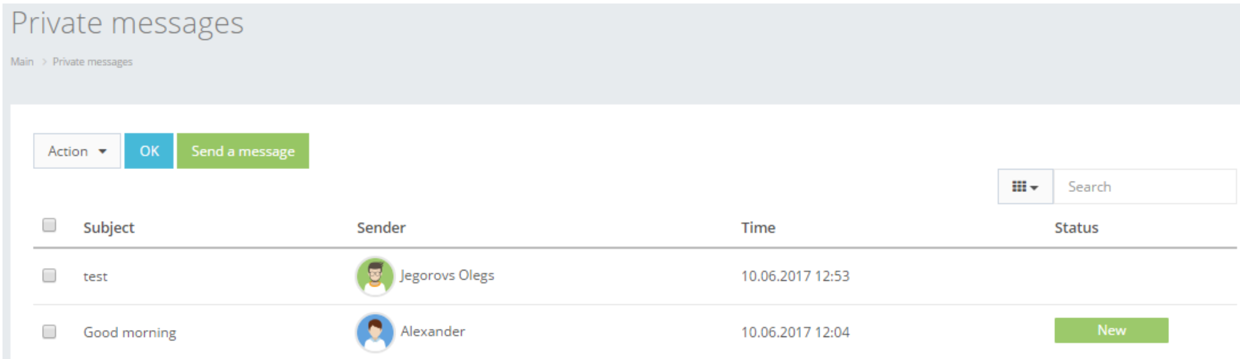
- Review the message list

Once a new message is received, you will see a notification in the control panel.



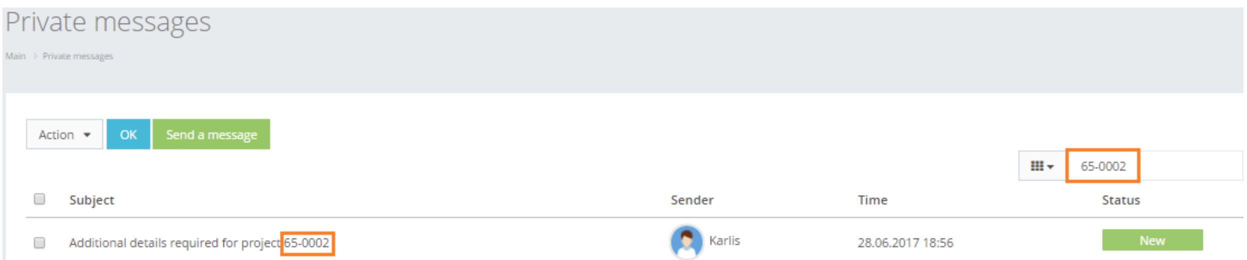
Click on the message icon to open the message.

Click “Show all messages!” to view the message list.



User can filter data in the Messages database by using 3 methods:

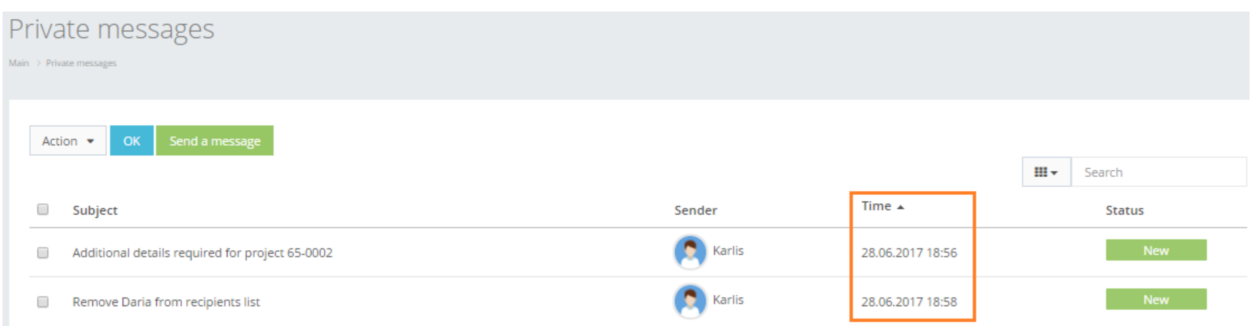
1. Type letters or numbers in “Search” field and click “Enter”



The System searches for the messages according to message name and content.

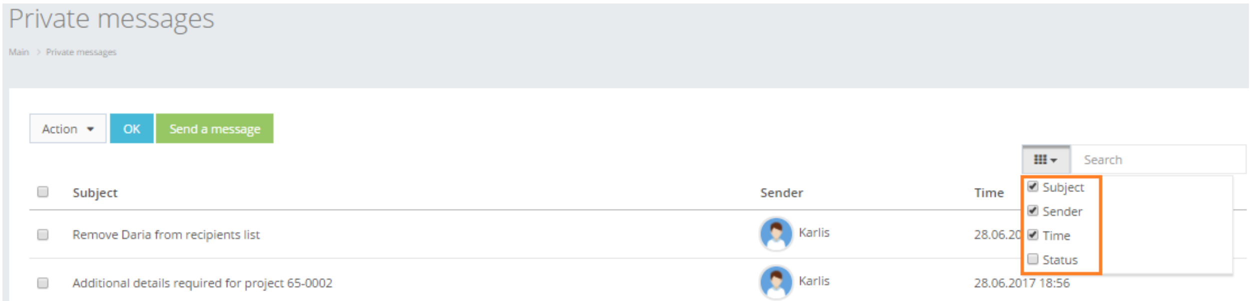
! Please note that data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on a column name.

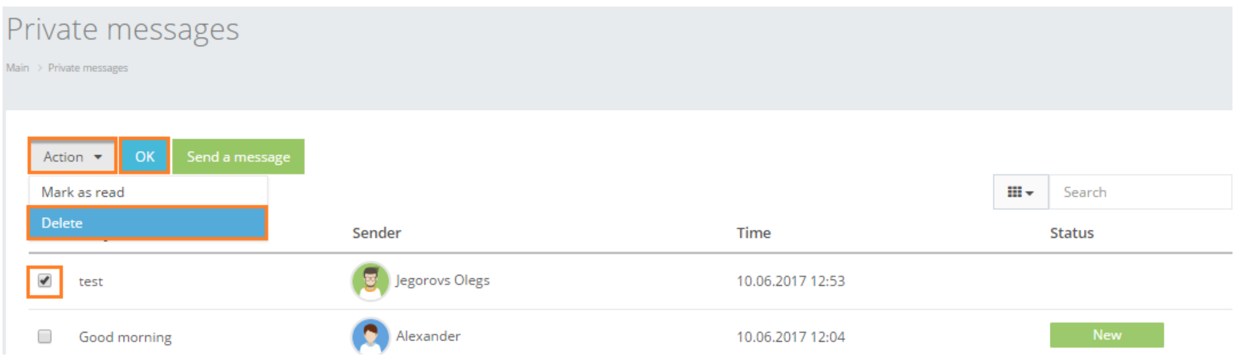


3. Review the columns that you want to see in the Messages table. To add or remove particular column from the table, simply click and select the columns that you want (or do not want) to view in the Messages database. This feature is especially relevant if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

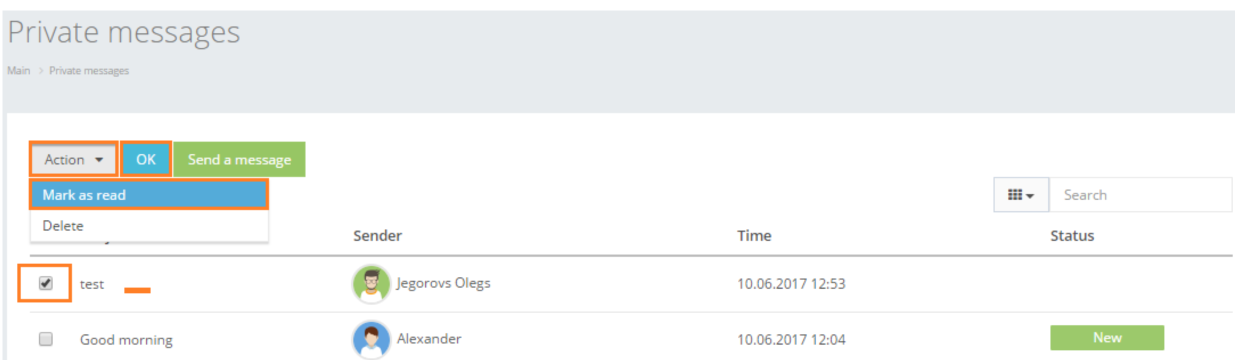
! Please note that the system will save these settings for upcoming user sessions.



- In order to delete a message, mark the message that you would like to delete, click "Action", choose "Delete" and click "OK".

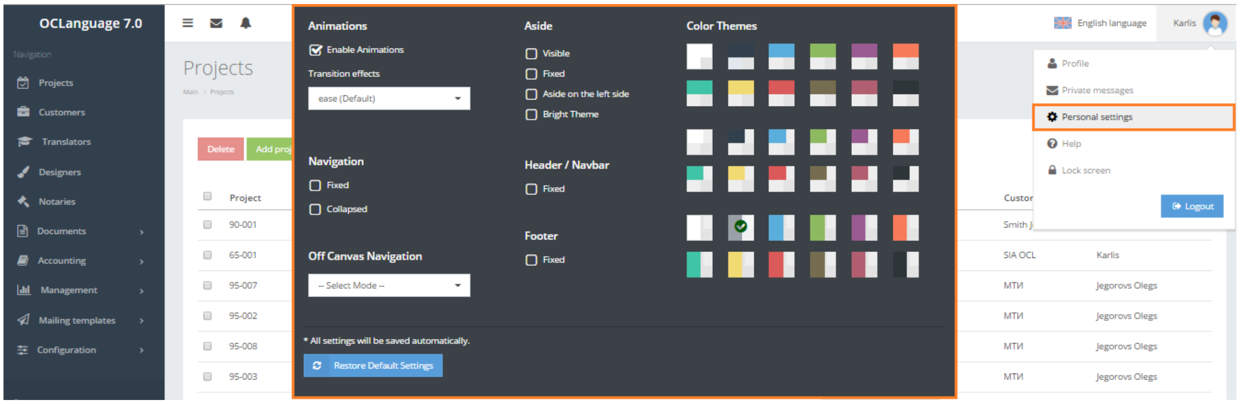


- In order to mark a message as read, mark the message that you wouldn't like to open, but mark as already read, click "Action", choose "Mark as read" and click "OK".

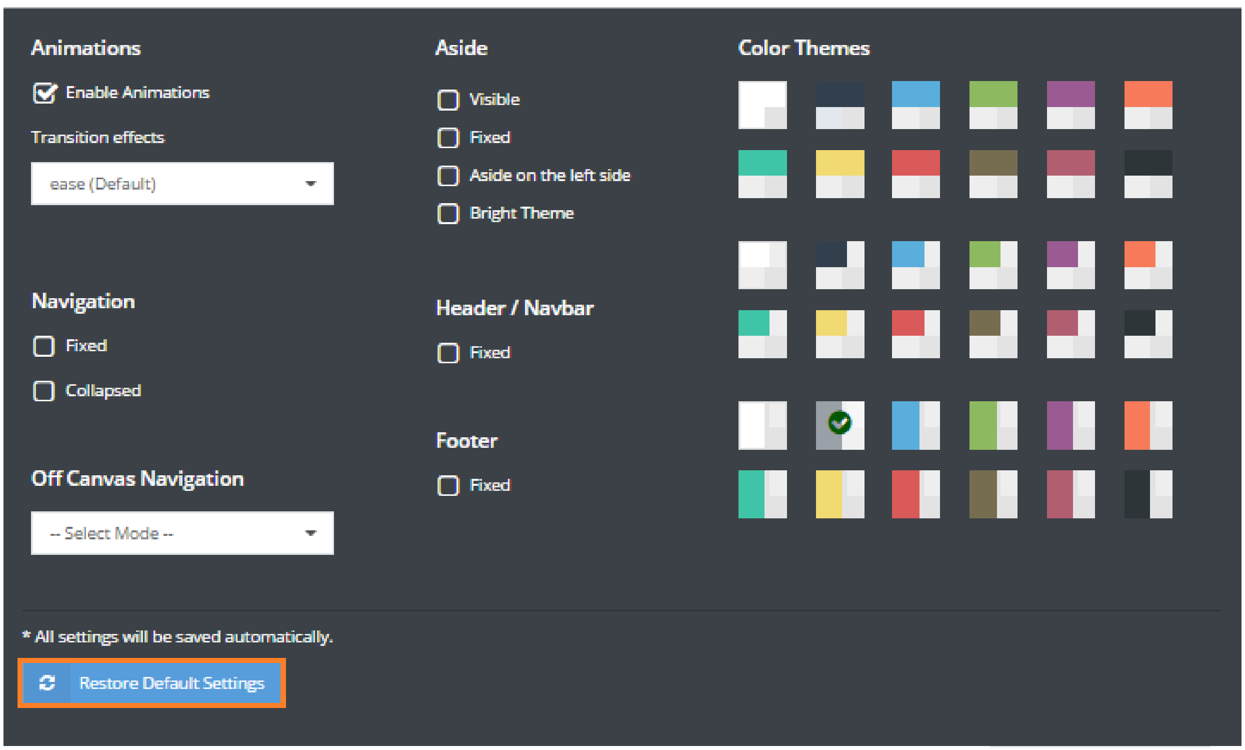


3. Personal settings

Click "Personal settings" and the system will automatically open the OCLanguage interface configuration window (in the middle of desktop).

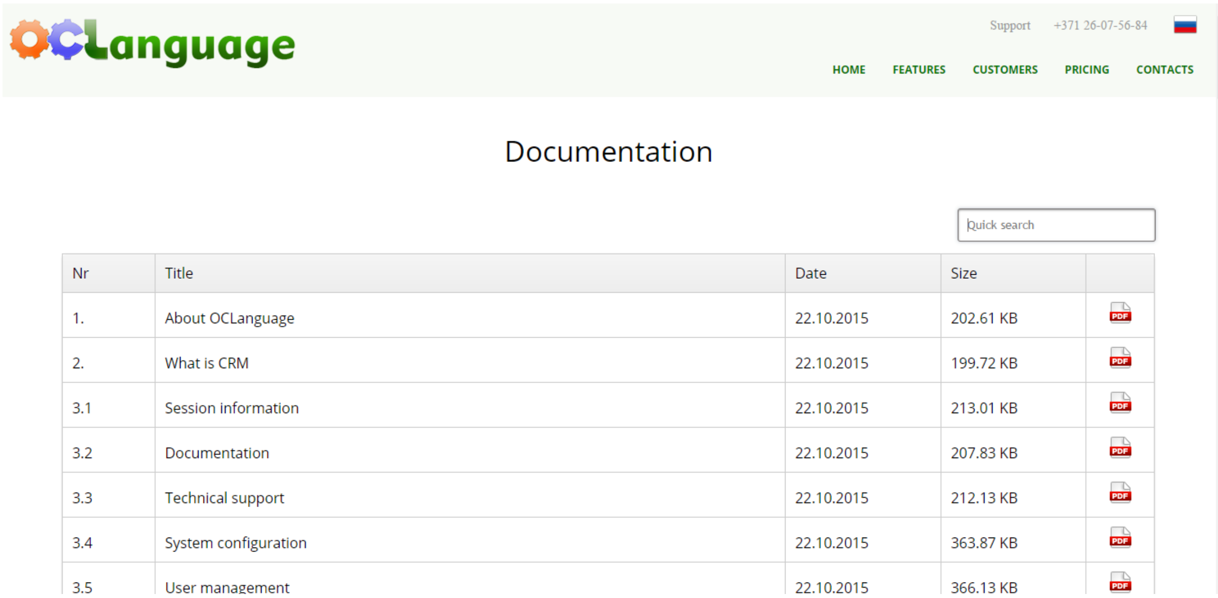


! Please note that every user sets his own interface settings. Click “Restore default settings” to return to the initial interface settings.

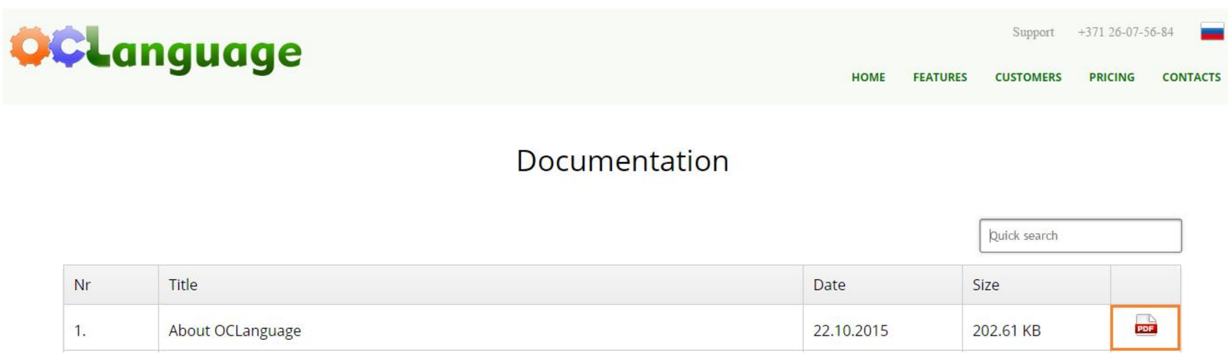


4. Help

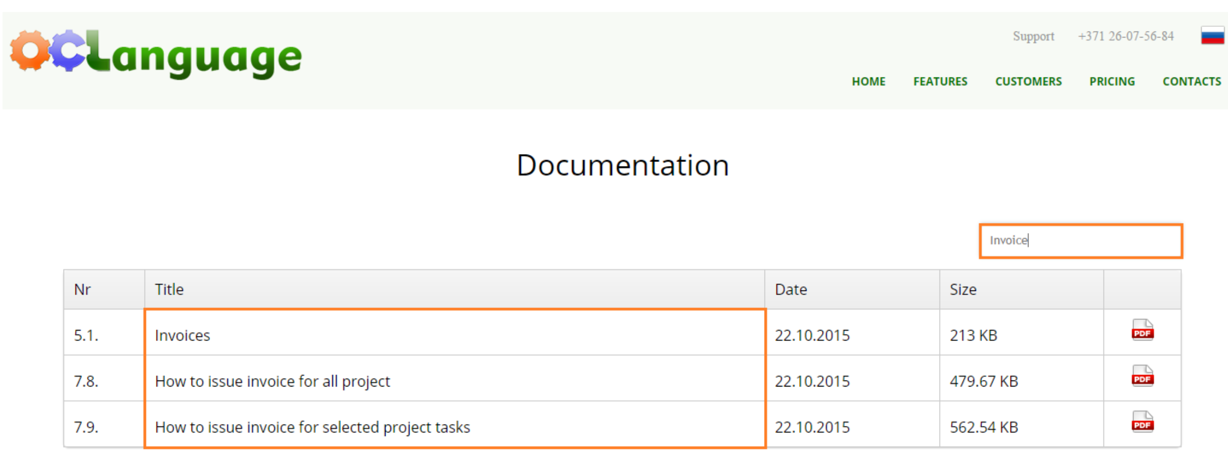
By clicking “Help” OCLanguage automatically opens its Documentation portal, from where you can download either specific part of the user manual or download full manual in one document.



To download a document click on the PDF icon (the system will download the .pdf file to your computer).



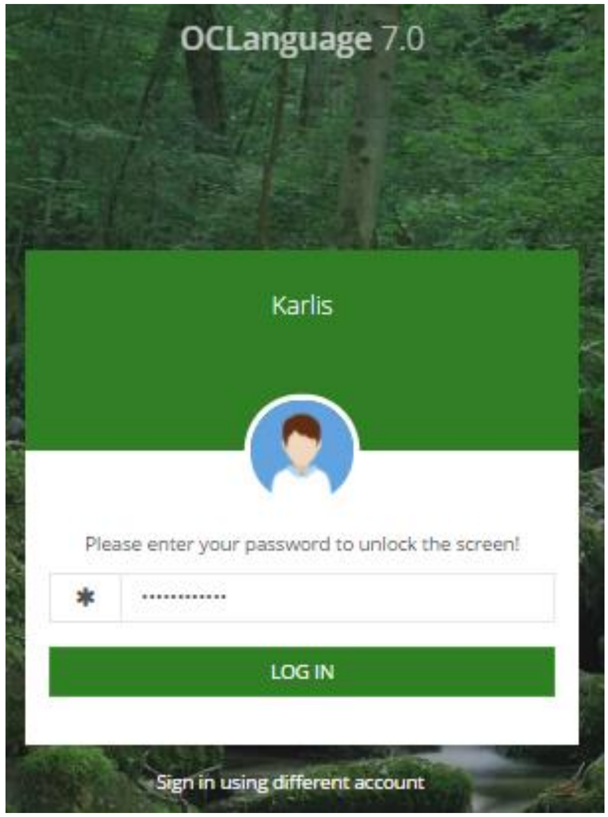
Use “Quick search” form to find the needed document by writing key words. The System will automatically provide all documents, whose names contain key word(s).



5. Lock screen

Click “Lock screen” to lock your workstation.

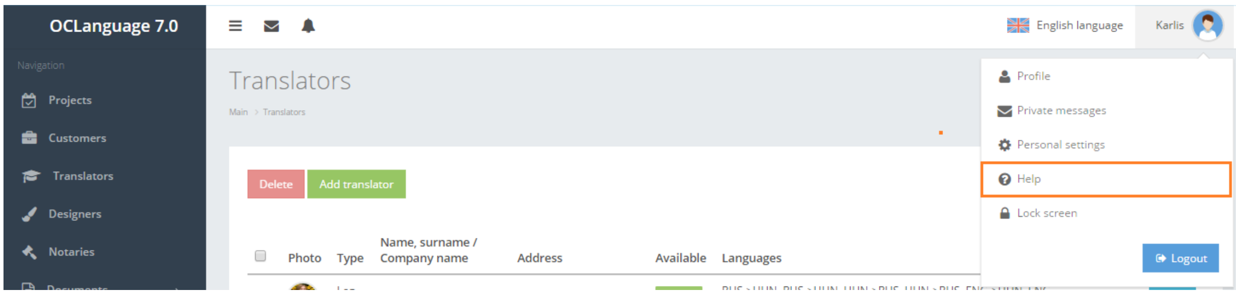
Unlock it by submitting a password and clicking “Log in”.



3.2. Documentation

User can browse documentation locally via software interface or via our website (www.oclanguage.com/documentation). Besides the documentation portal, a user can download the system documentation via OCLanguage interface.

To download the system documentation log in into OCLanguage and browse User details -> Help.



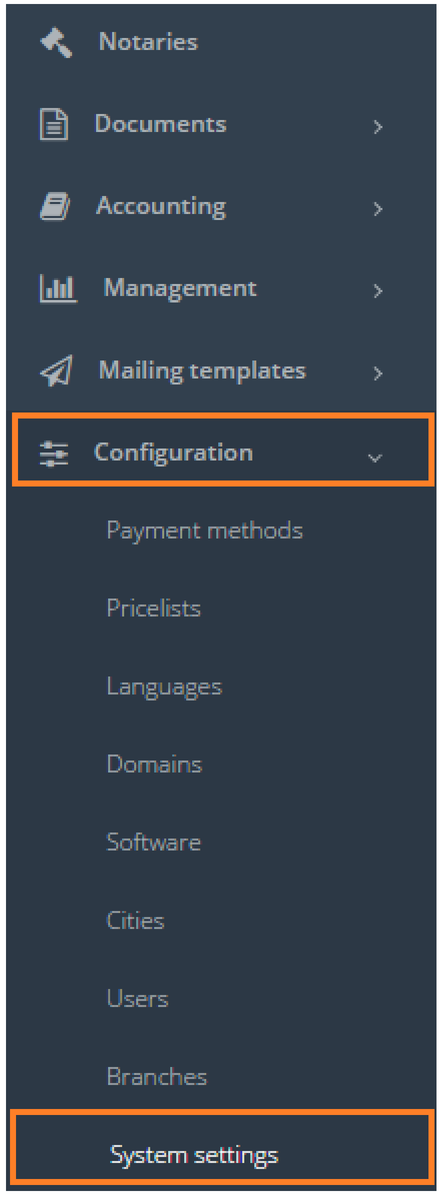
3.3. Technical support

OCL is a Customer-driven Company always available for addressing inquiries from its Customers.

Our Customers can benefit from dedicated technical support package that one can rent as a service. See more information here.

3.4. System configuration

To open system configuration, click “Configuration” -> “System settings” on the Navigation pane.

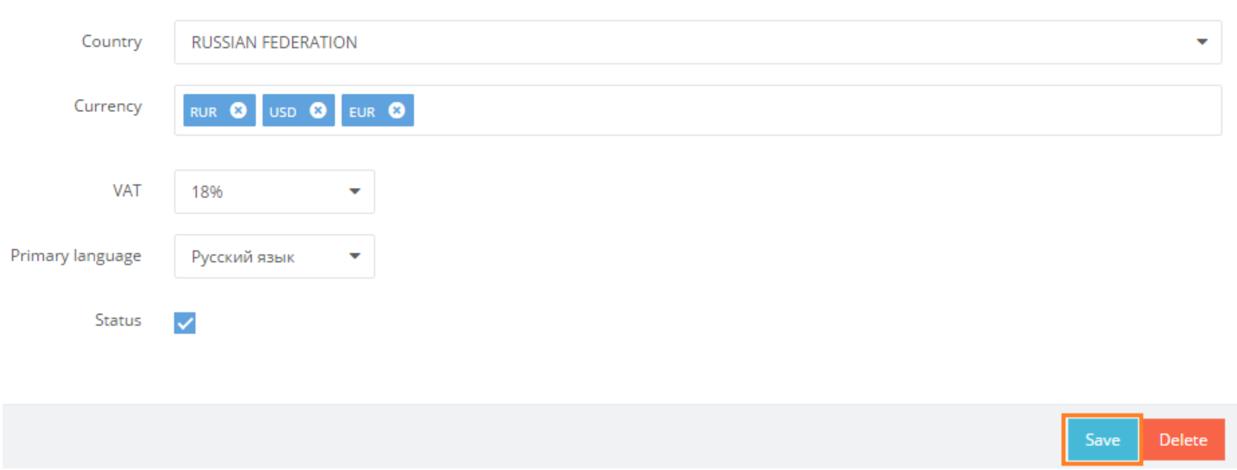


By default, system has one main configuration.

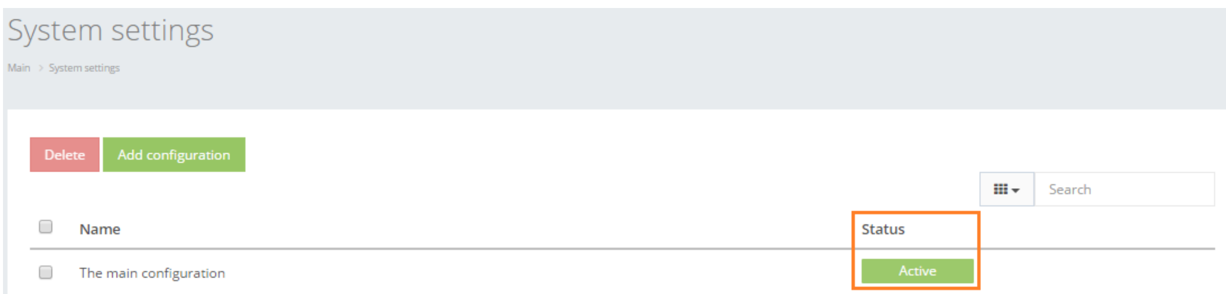
See the description below, where the data of system configuration are used.

Field	Description
Name	Name of particular configuration
Administrative e-mail	E-mail for receiving system notifications
ICQ number	ICQ number (for information purpose)
Skype username	Skype username (for information purpose)
Domain name	Server authorization name
Company name	Company name (included in Acts of acceptance)
Registration No.	Company registration No.
Name (in English)	Company name in English
Legal address	Legal address
Actual address	Actual address
Legal address in English	Legal address in English
Actual address in English	Actual address in English
Bank name (requisites)	Bank name (used for system documents)
Bank account (requisites)	Bank account number (used for system documents)
Contact details	Contact details (used for system documents)
Payment details	These data are used in e-mail templates (under section Mail). You might want to contact a Support team to discuss this functionality.
Country	Country name
Currency	Currencies that a translation agency operates with (will be revealed in system documents)
VAT	Default VAT rate
Primary language	System interface language, that OCLanguage will have by default
Status	Status of the configuration. At one time only one configuration can be primary.

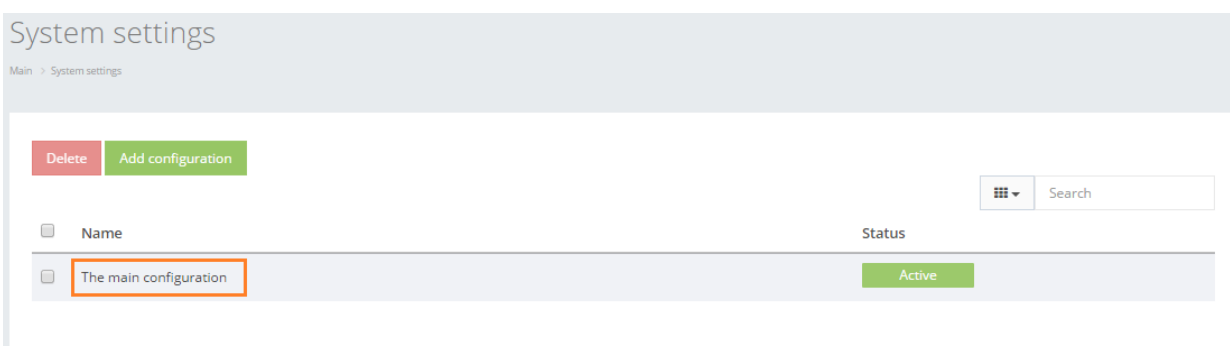
After all fields are filled, click “Save”.



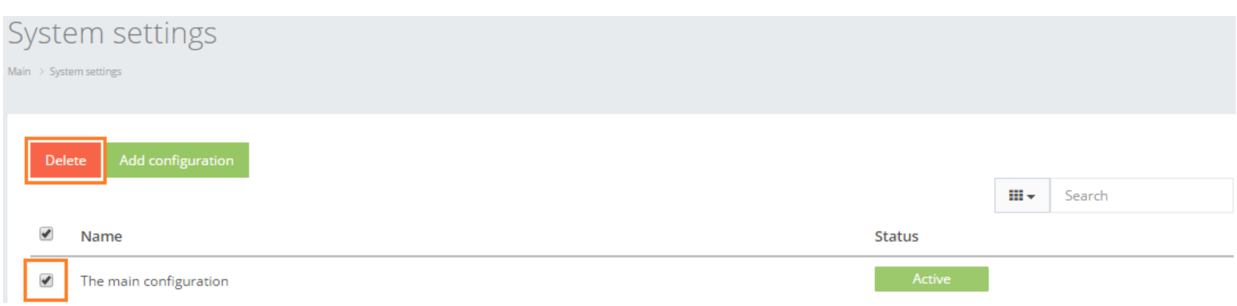
In general view of the System settings, you can see all system configurations. The one with a checkmark is considered as primary system configuration.



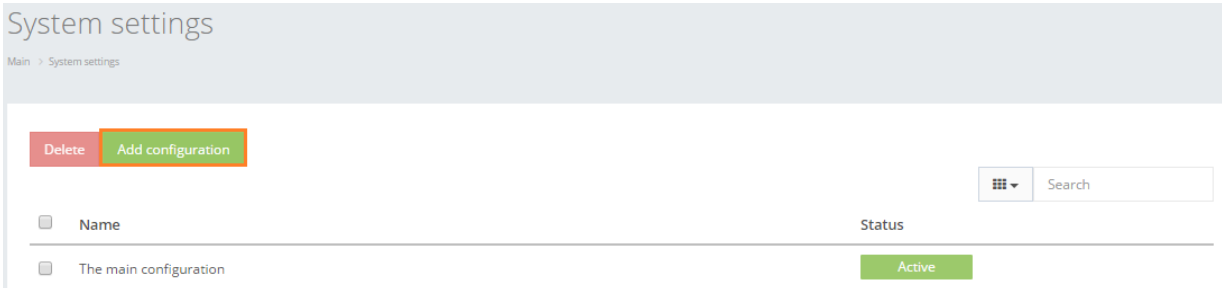
Click on “The main configuration” to review the system configuration data.



In order to delete particular configuration, check the box next to configuration that you want to delete and click “Delete”.



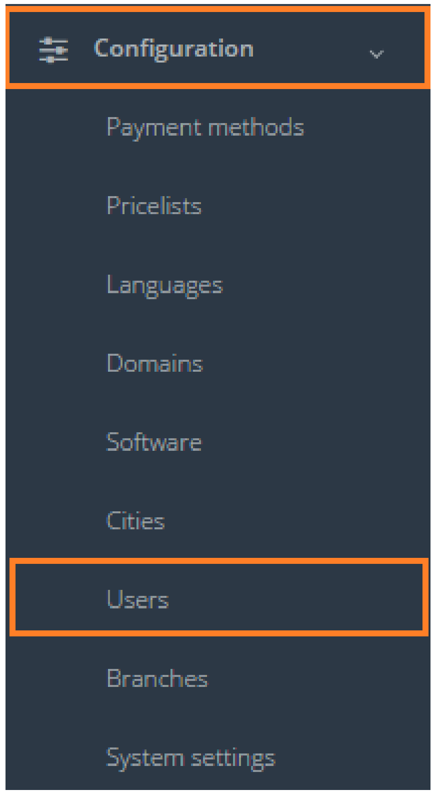
Click “Add configuration” to add a new system configuration.



OCLanguage allows to have not one, but several system configurations. This might be a relevant option if the user wants to issue the system documents from different Legal names.

3.5. User management

To open system configuration click “Configuration” -> “Users” on the Navigation pane.

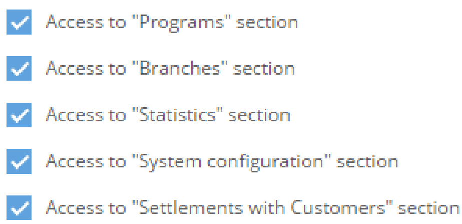


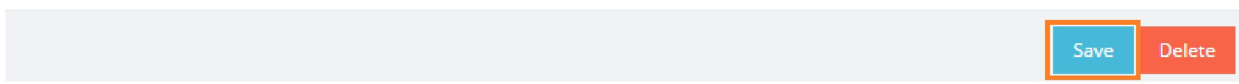
In the table below you will see the description of each field in users’ data.

Field	Description
Login	Set username for the manager
Name	Name of the manager
Surname	Surname of the manager
Patronymic name	Patronymic name of the manager
E-mail	E-mail address of the manager
Position	Position of the manager
Password	Password
Repeat password	Repeat password
Branches	By marking branch you assign this manager to be able to work with the Customers belonging to a particular branch
Rights	Grant rights for particular actions
Administration rights	Administrator rights grant full privileges in the system (access to all system sections and all three rights described below
Signature authority	Manager is authorized to sign system documents
Rights to add a client manager	User is allowed to add a manager taking care of the Customer (in Client data)

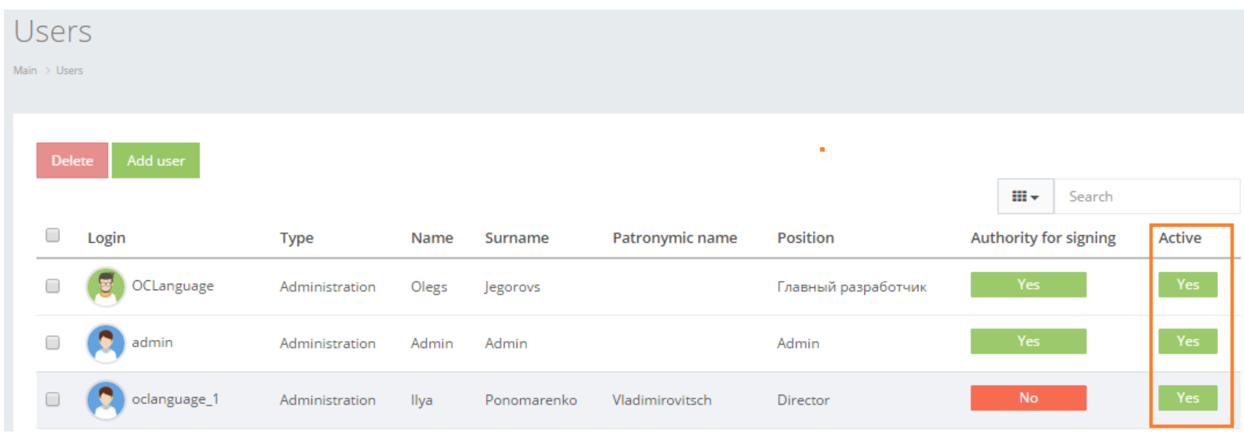
Right to delete financial transactions	Manager is allowed to delete the records in Payments and Income sections
Access	Administrator is able to grant access to any of the system sections. Leave particular “Access” field empty to prevent the user from access to the system section.

After all needed fields are filled, click “Save”.

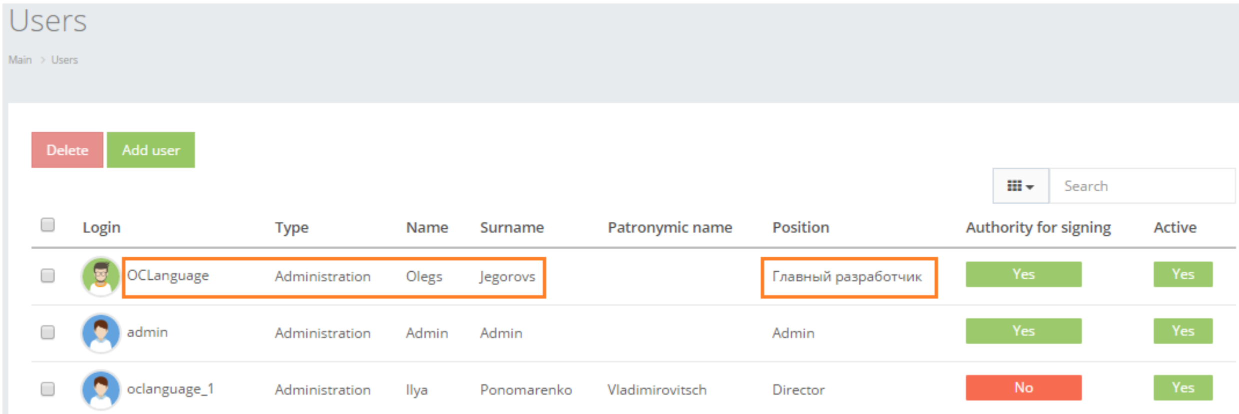




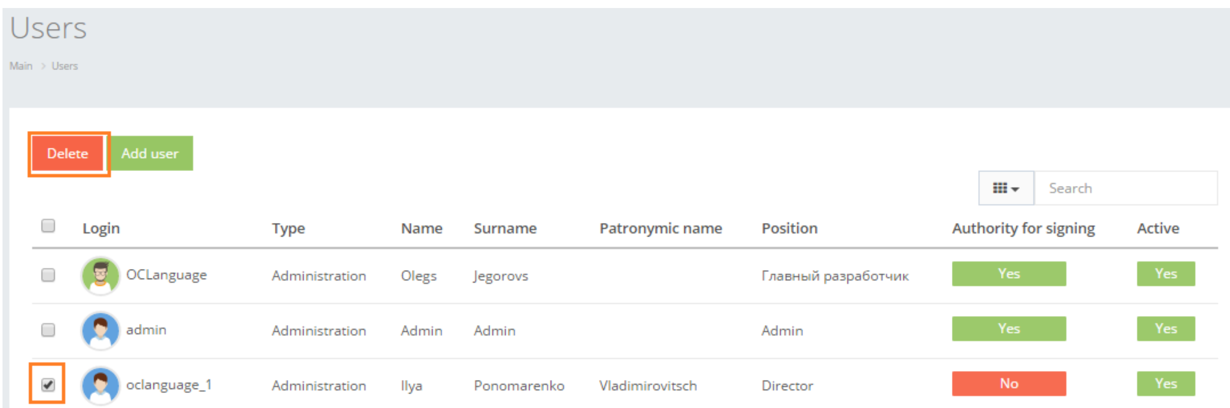
In general view of Users you can see all user accounts. The column “Active” shows which user accounts are active, which means that the user is able to log in into OCLanguage and proceed with actions.



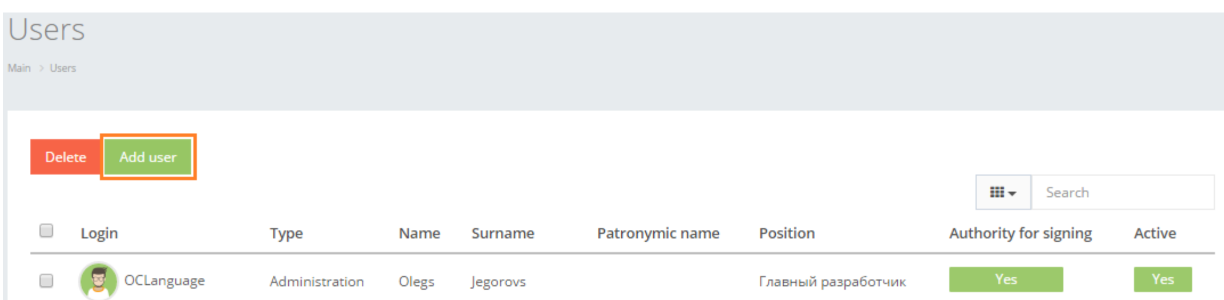
Click any place on the text to browse User data.



In order to delete a particular User, check the box next to the configuration that you want to delete and click “Delete”.

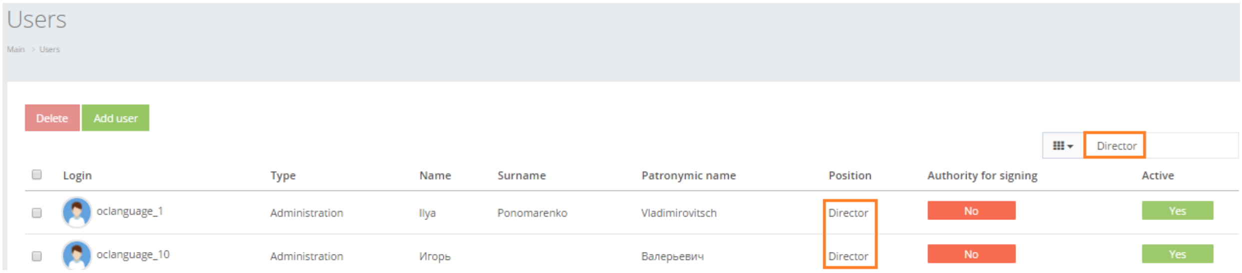


Click “Add new user” to add a new system user account.



User can filter data in the System users database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

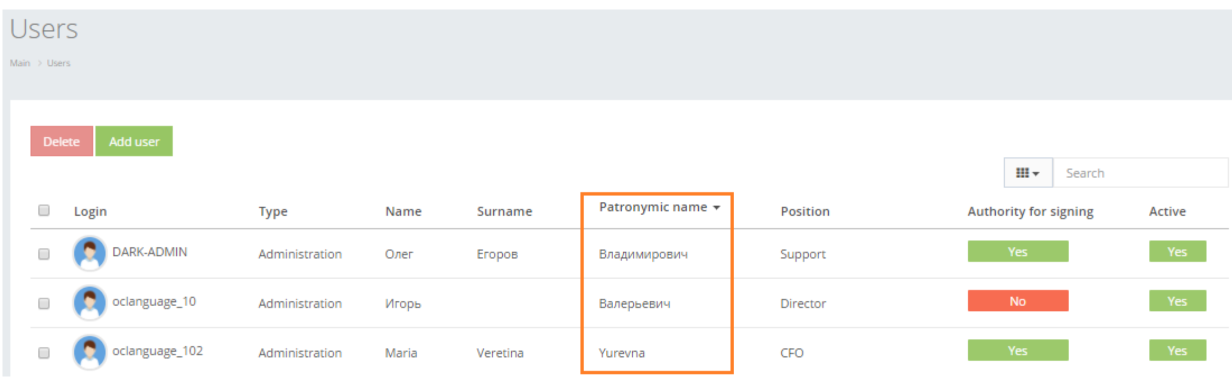


Below you will see a list of parameters (column names) the system searches data for:

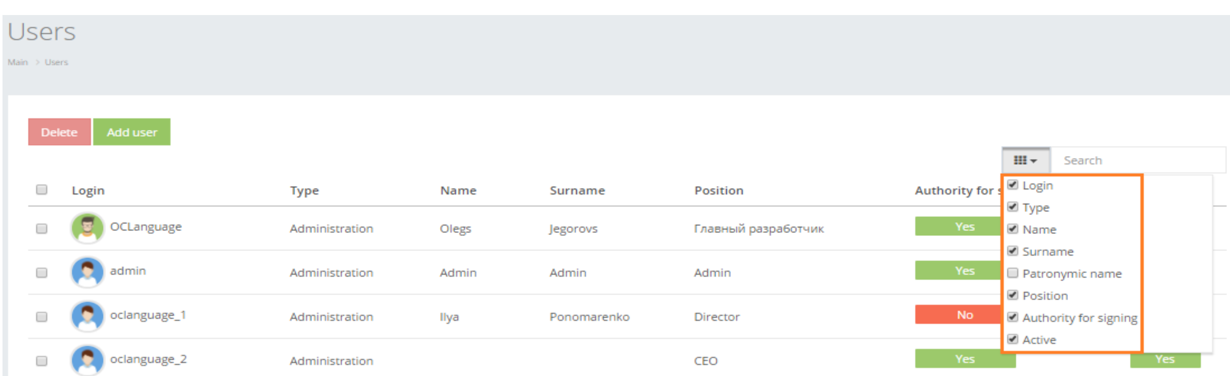
- Login
- Name
- Surname
- Patronymic name
- Position.

! Please note that data filter can be removed by deleting the text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the System users table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the users database. This feature is especially relevant if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.



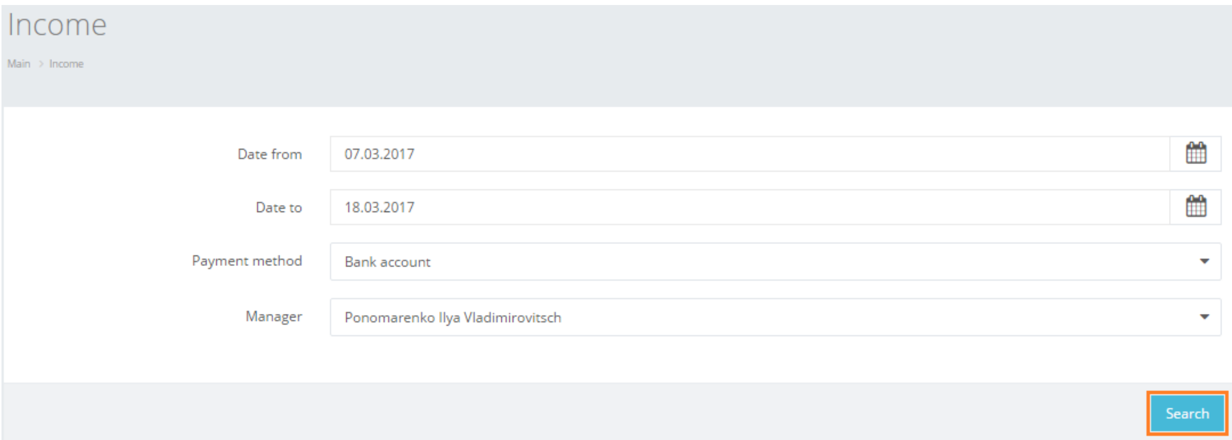
! Please note that the system will save these settings for upcoming user sessions.

3.6. Search

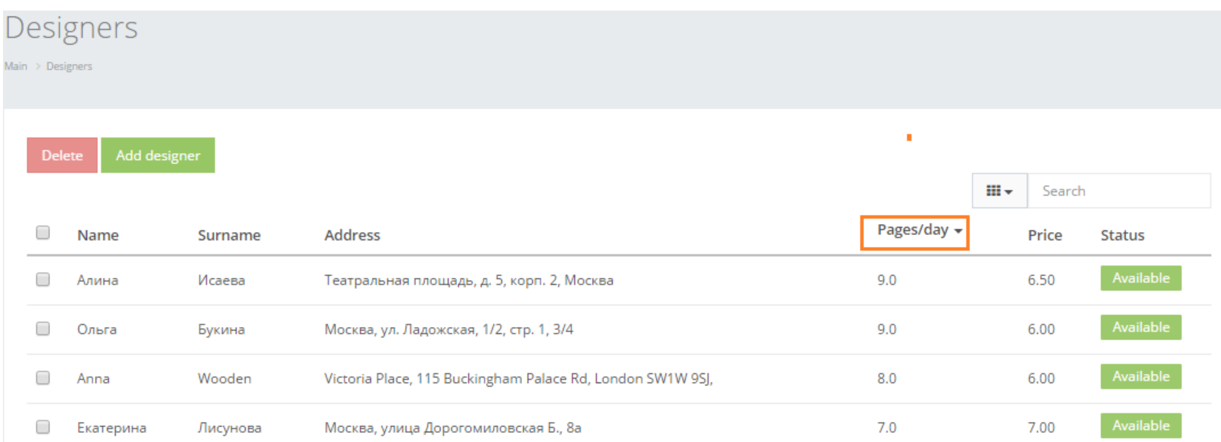
Use “Search” section, which is located above the table, to filter data. In order to filter the needed data you will have to fill in the data or choose from the available options.

There is documentation of search options in every section related to the database (vendors, Customers, Invoices etc.).

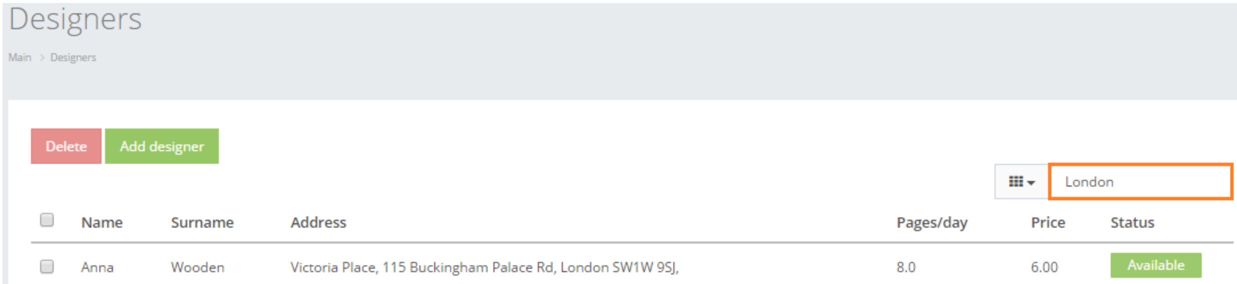
Click “Search” button to initialize a search process.



In every table the user can filter data according to the column. Click the column name to sort all data according to the particular column.

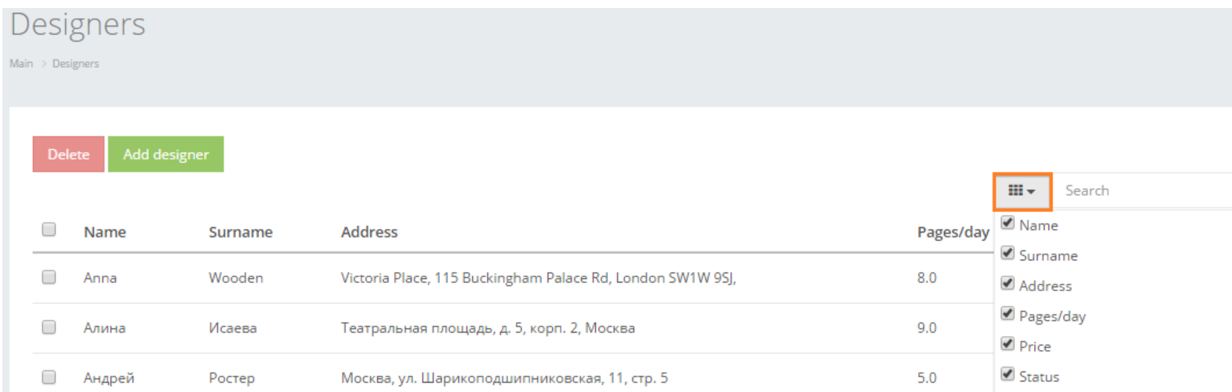


Use fast search function to type in letters, numbers or words for immediate search of the information.



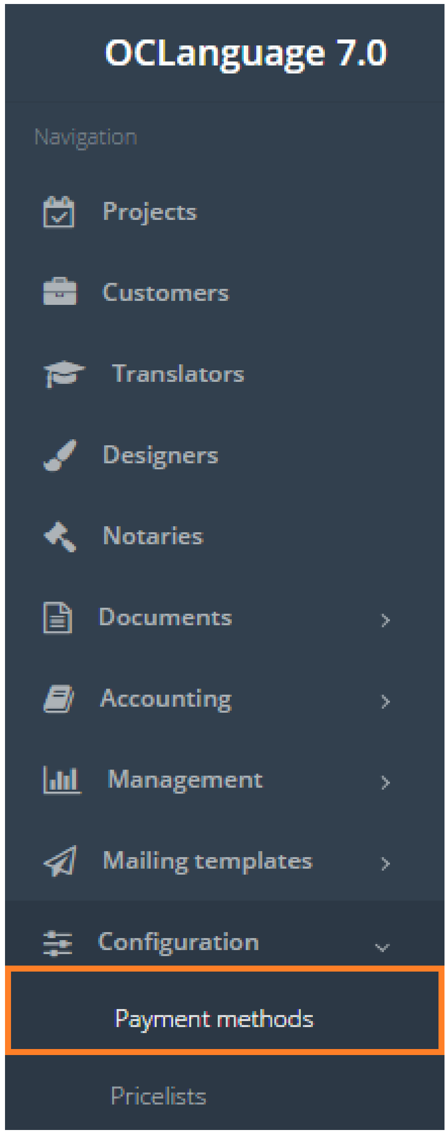
! Please note that you can use Search option and Fast search option afterwards, if needed. However, if you will process Fast search request and after this fill in a parameter in any of the Search fields, the system will drop down a Fast search parameter, but use only Search information.

Use drop down option to check the columns, which you want to be revealed in the table. Unchecked columns will be hidden. User can always browse a full table by simply checking all columns.



3.7. Payment methods

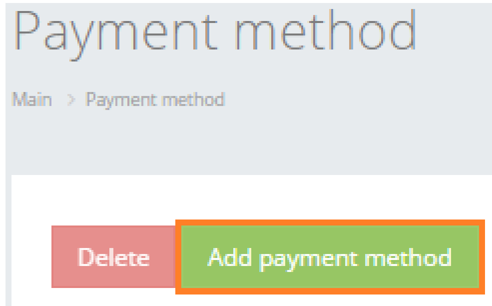
To open the system configuration click “Configuration” -> “Payment methods” on the Navigation pane.



Payment methods table data contains all payment services that a translation agency works with. Payment methods are revealed in the following system sections:

- Translator’s data
- Customer payment data
- Project data (under Tasks section)
- Payment section
- Income report.

To add a new payment method click “New payment method”.

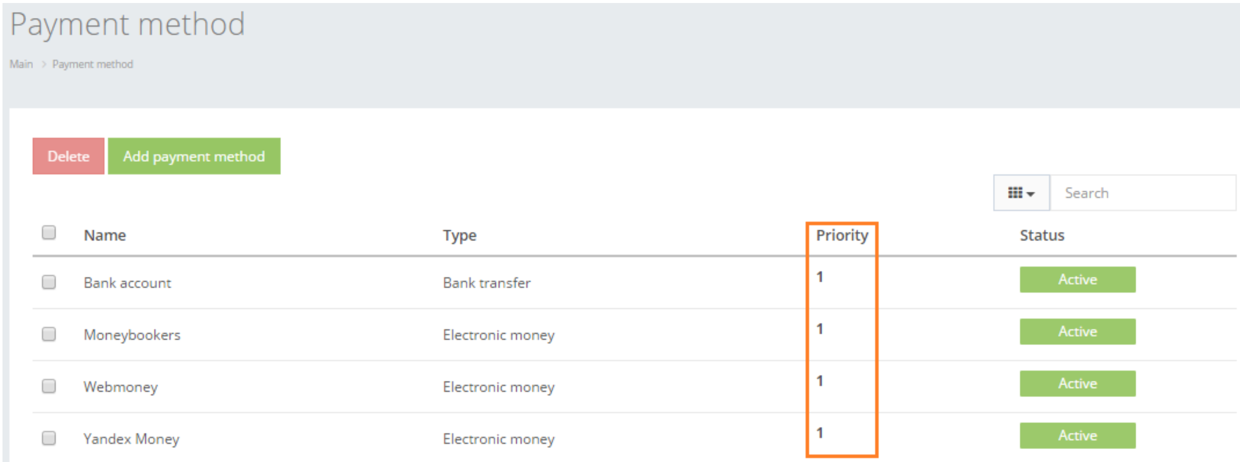


In the table below you can see the description of fields related to payment methods.

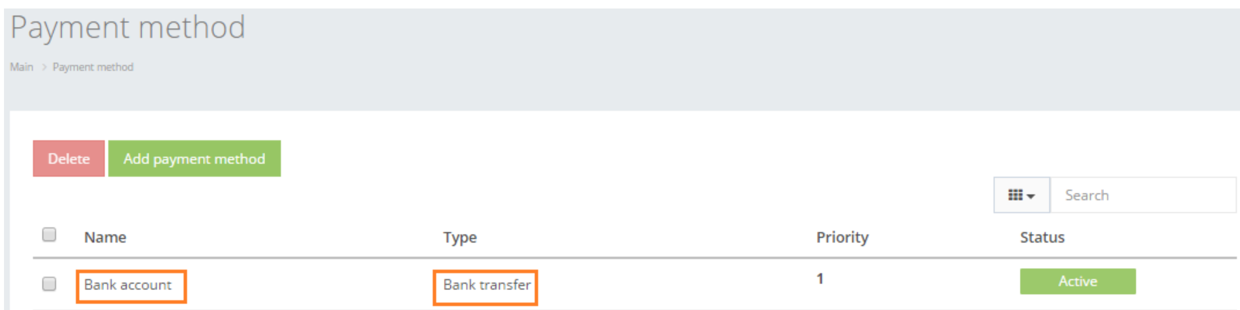
Field	**Description**
Name	Name of payment method
Type	Choose payment type between “Bank” and “Electronic money”
Requisite fields (name)	Bank Identifier Code
Correspondent account	Specify the name of requisite field (for example, SWIFT code, WMID etc.) once this is saved, all of these fields will appear in the translator’s data.
Additional information	Fields for additional information to be stored in payment method details, for example: Name: home site Value: www.hsbc.com
Fields details	Field setup for translators’ payment data, for example, field name might be Card account, Ledger account, SWIFT and once this is saved, all of these fields will appear in the translator’s data.
The order of display	Priority of revealing payment methods. 1 — highest priority (reserves 1^{st} place in the list of payment methods)
Status	Check this box to include a payment method in the translator’s data.

After fields are filled, click “Save”.

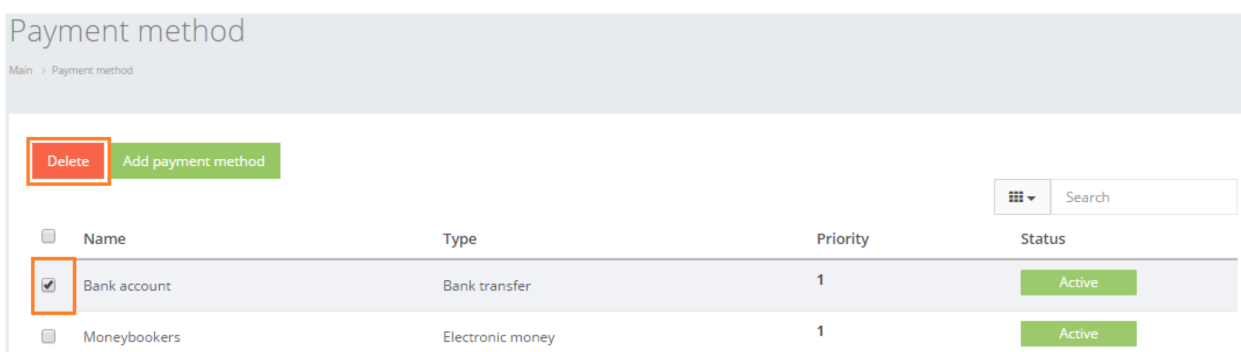
In general view of the payment methods you can see all methods of payment. The column “Order of display” shows the priority of revealing all payment methods, one after another.



Click on the text to browse the Payment method data.

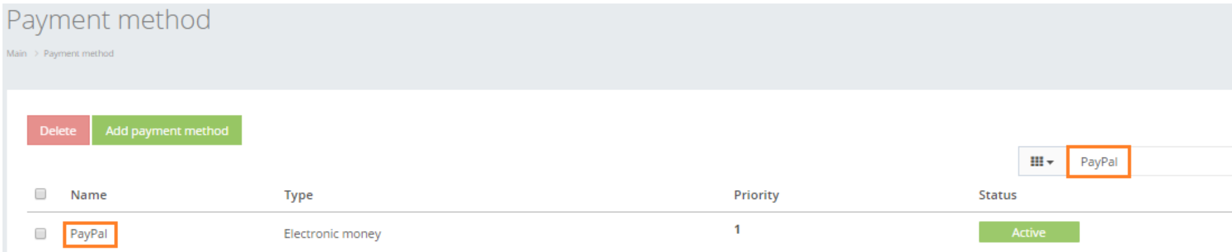


In order to remove a particular Payment method, check the box next to the payment method that you want to delete and click “Delete”.



User can filter the data in the Payment methods database by using 3 methods:

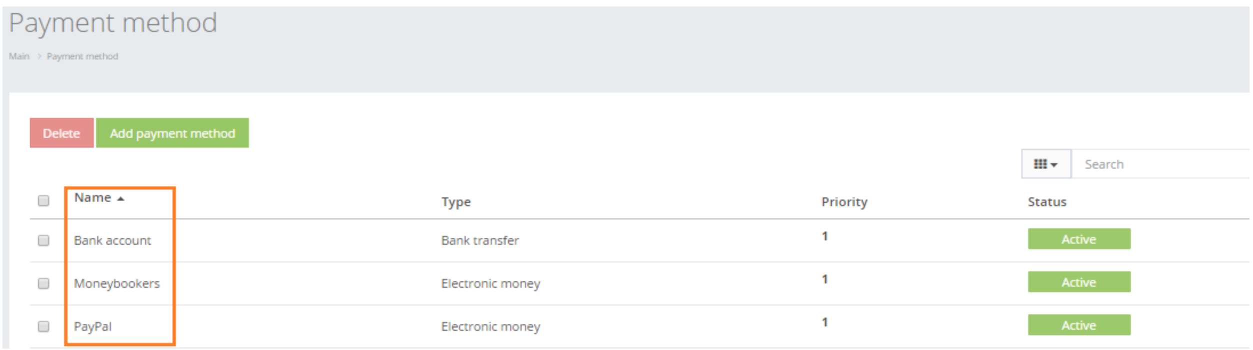
1. Type letters or numbers in “Search” field and click “Enter”



The system searches payment methods according to the payment method name only.

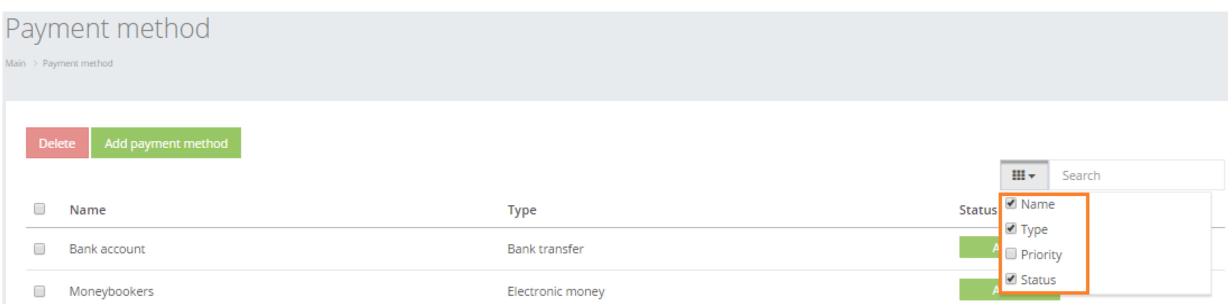
! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the Payment methods table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payment methods database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

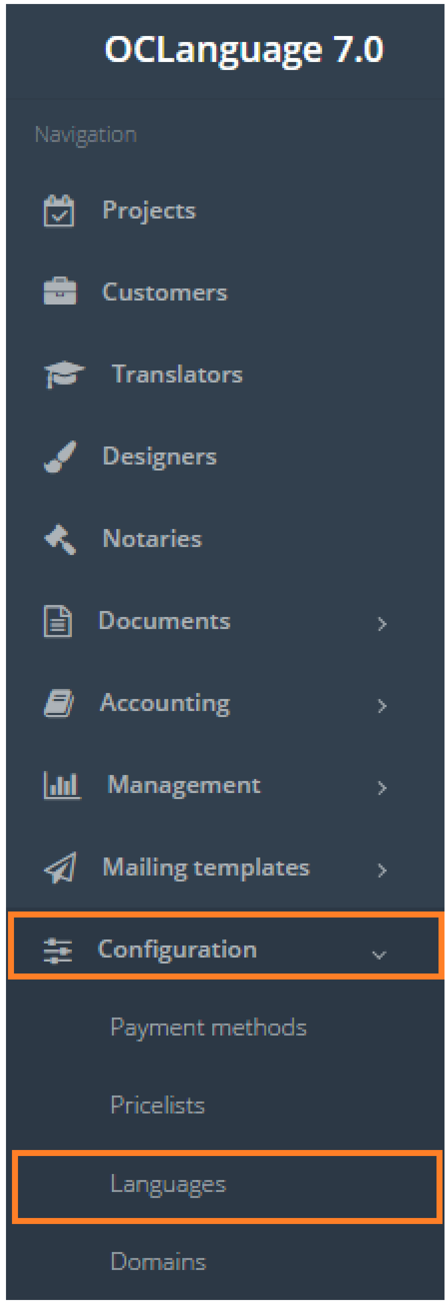
! Please note that the system will save these settings for upcoming user sessions.



3.8. Languages

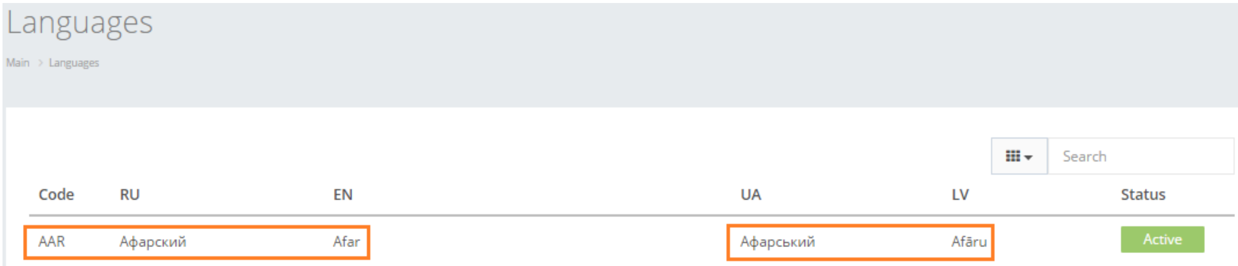
A system user defines which languages will be included in the list of languages throughout all system (translator, project data).

To open the system configuration click “Configuration” -> “Languages” on the Navigation pane.



The system includes the majority of languages used worldwide. A user can NOT add a language by himself. If addition is needed, a user should apply for support from OCLanguage developers.

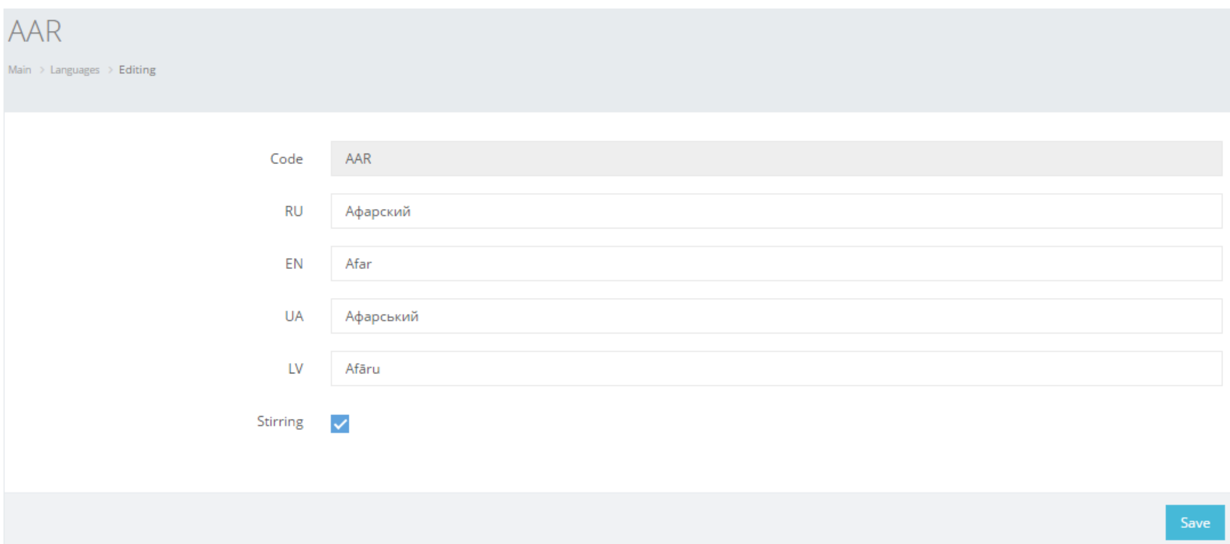
Click on the text to browse Languages data.



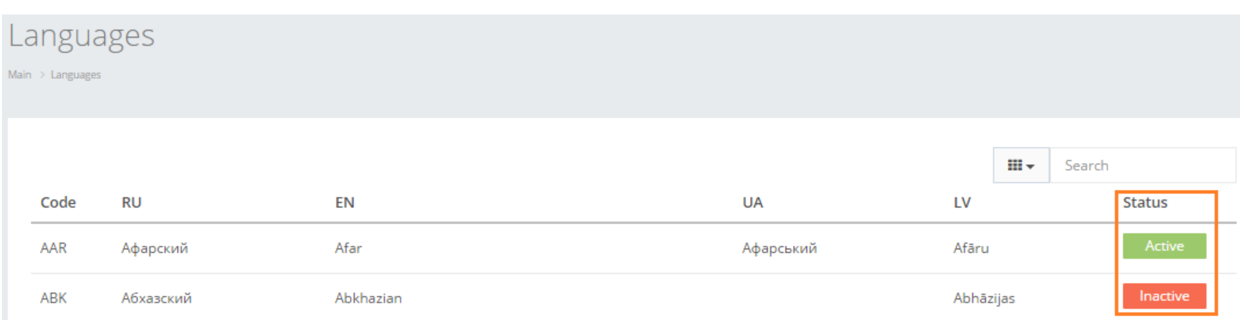
In the table below you will see the description of the fields related to language description.

Field	**Description**
Code	Pre-defined language code standards
EN, RU, LV, UA	Translation of each language into OCLanguage system interface languages
Stirring (active)	Check this box if you wish to include this language in language list

After the fields are filled, click "Save".

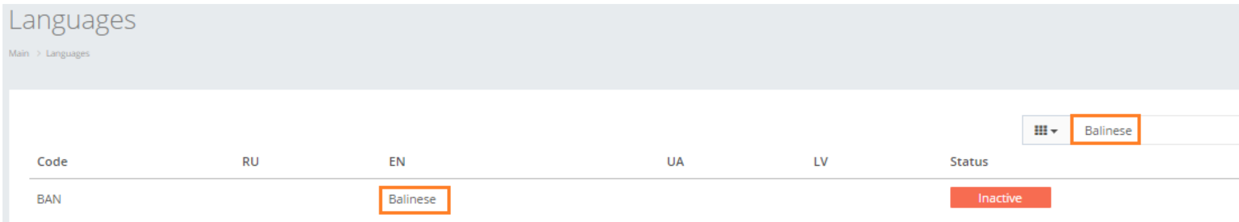


In general view of Languages you can see the database of all languages. The column "Active" shows which languages are included in the system, which means that the user is able to choose this language while working on translator's or project data.



User can filter data in Languages database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

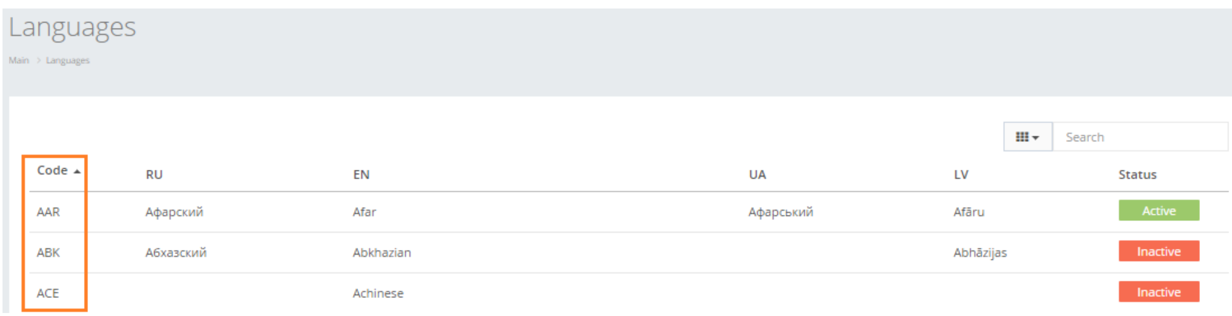


Below you will see a list of parameters (column names) the system searches data for:

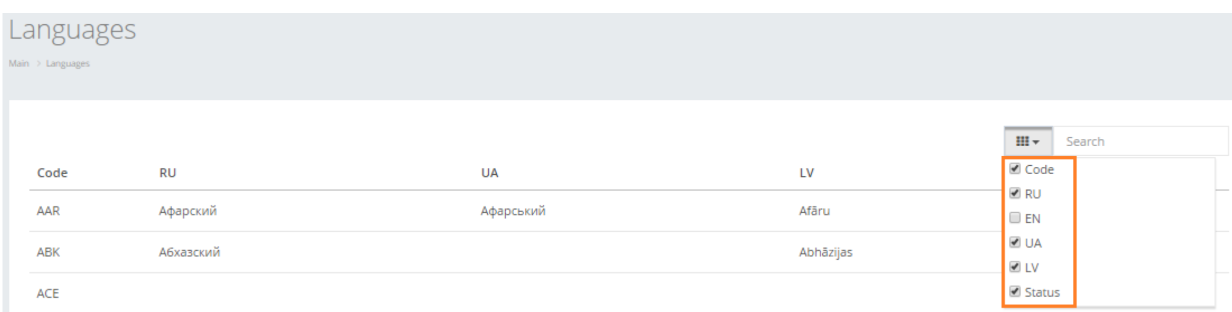
- Language code
- Language name in Russian
- Language name in English
- Language name in Ukrainian
- Language name in Latvian
- Language status (active or inactive).

! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



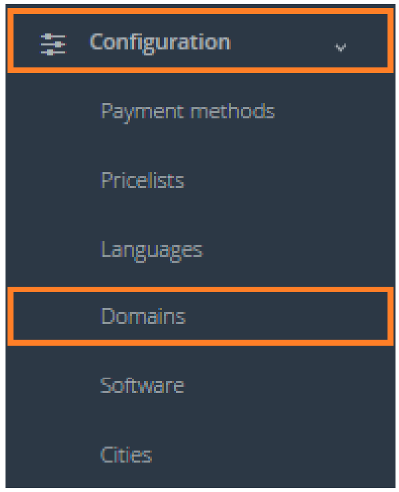
3. Review the columns that you want to see in the Languages table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Languages database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.



! Please note that the system will save these settings for upcoming user sessions.

3.9. Translation domains

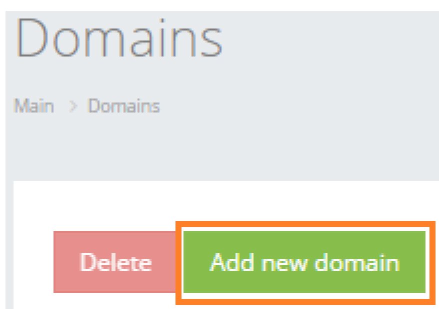
To open the system configuration click “Configuration” -> “Domains” on the Navigation pane.



Domain table data contains all translation areas that a translation agency is able to do translations for. Translation areas are revealed in the following system sections:

- Translator’s data
- Translator’s section.

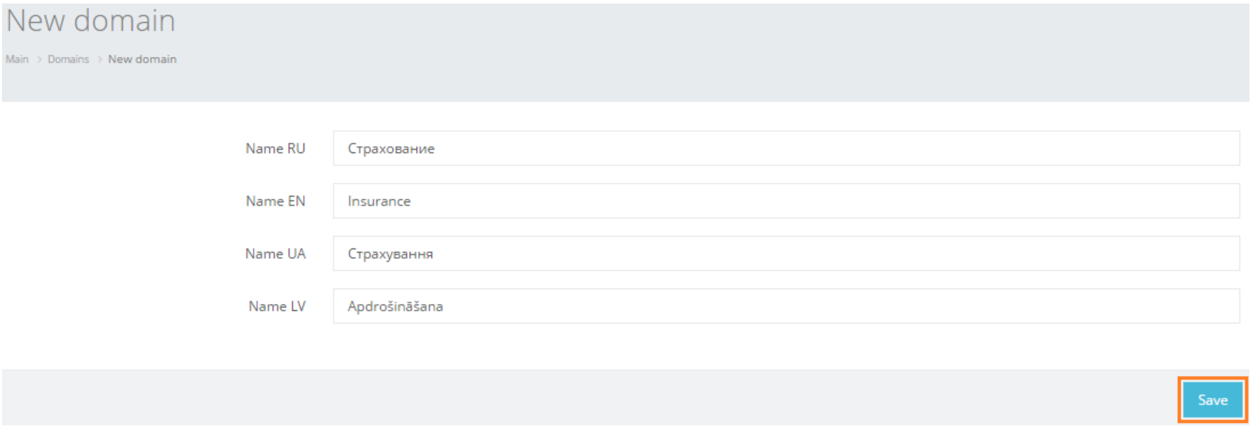
To add a new translation area click “Add new domain”.



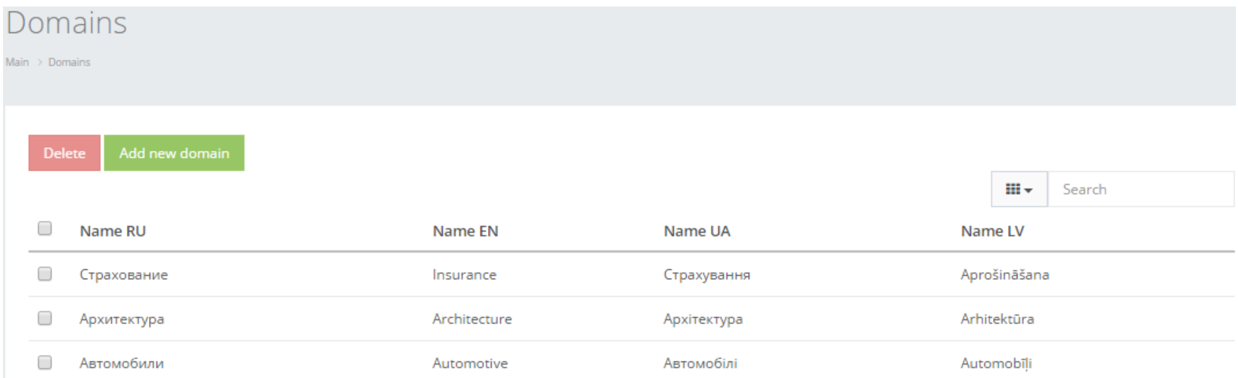
Field	Description
Name [EN]	Translation domain name in English
Name [RU]	Translation domain name in Russian
Name [UA]	Translation domain name in Ukrainian
Name [LV]	Translation domain name in Latvian

Value of each field is used in the interface of particular language.

After the fields are filled, click “Save”.

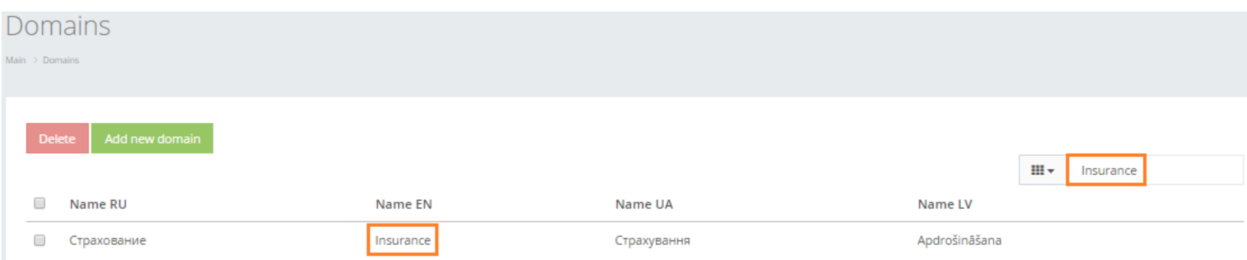


In general view of translation areas you can see all translation domains.



User can filter data in the Languages database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

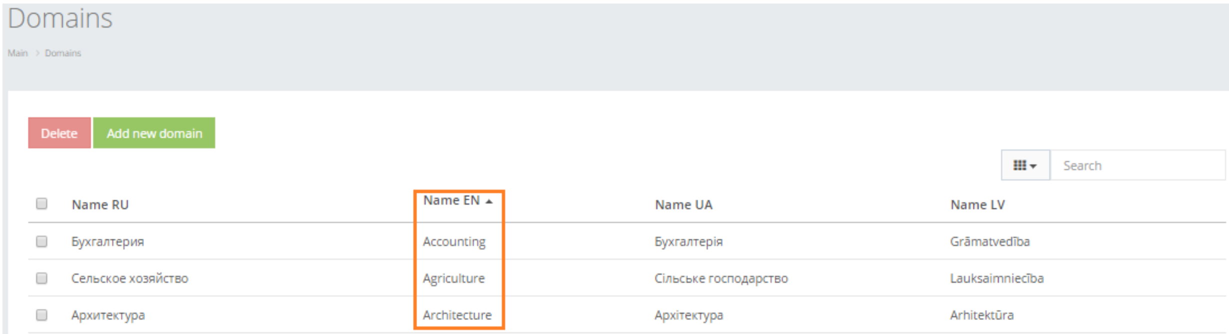


Below you will see a list of parameters (column names) the system searches data for:

- Domain name in Russian
- Domain name in English
- Domain name in Ukrainian
- Domain name in Latvian.

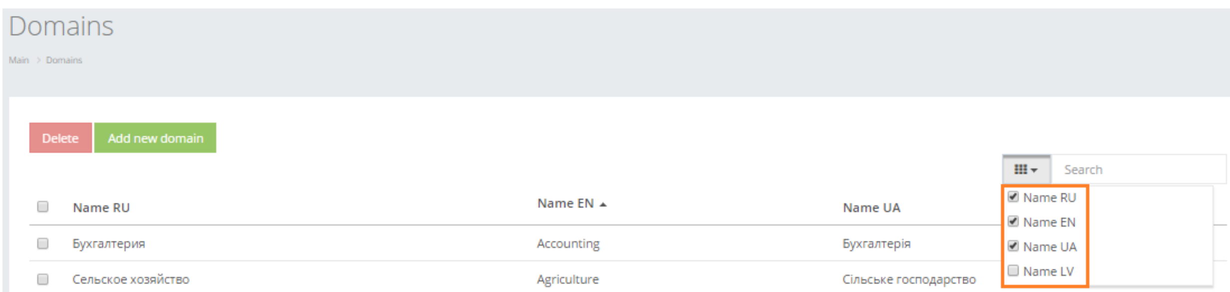
! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

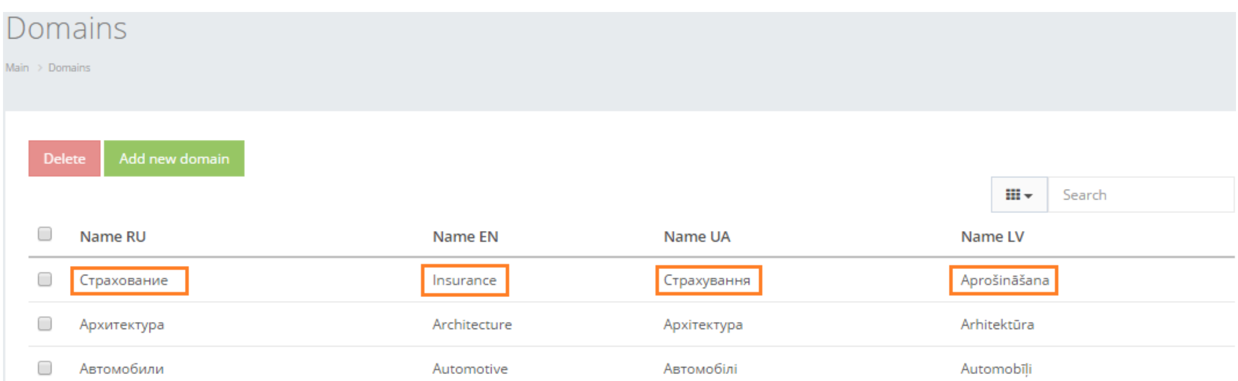


3. Review the columns that you want to see in the Translation domains table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Domains database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

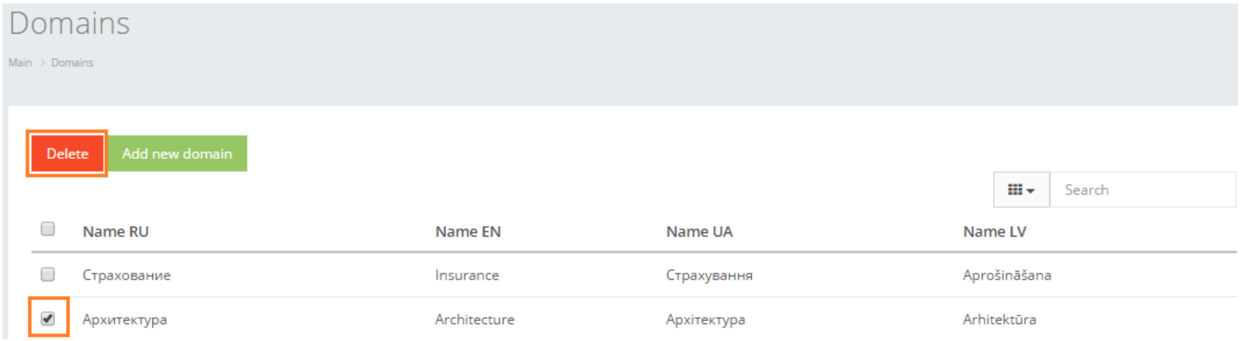
! Please note that the system will save these settings for upcoming user sessions.



Click on the text to browse Domains data.

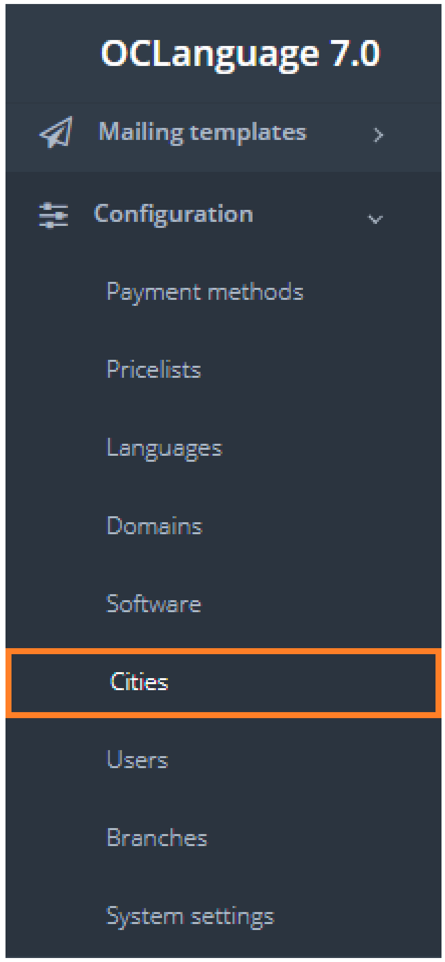


In order to remove a particular Domain, check the box next to the domain that you want to delete and click “Delete”.


Domains
Main > Domains
Delete
Add new domain
Search
Name RU
Name EN
Name UA
Name LV
Страхование
Insurance
Страхування
Apdrošināšana
Архитектура
Architecture
Архітектура
Arhitektūra

3.10. Cities

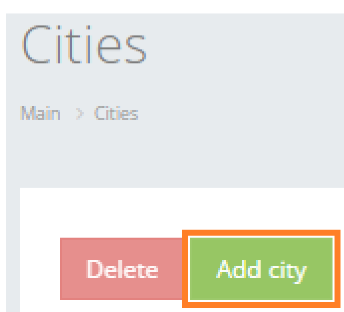
To manage a cities list browse “Board -> Cities”.



Cities are revealed in the following system section:

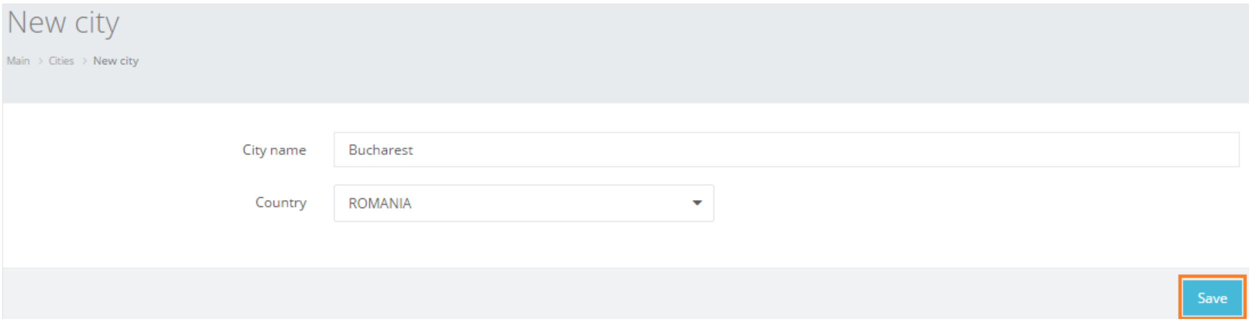
- Translators’ data (linking translator to a particular city).

To add a new city click “Add city”.

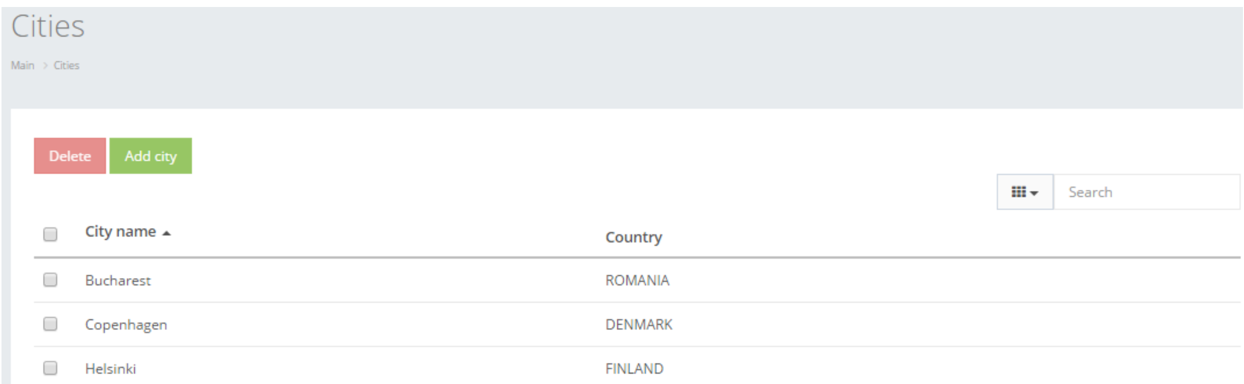


Field	**Description**
City name	Specify name of the city
Country	Choose a country from a pre-defined country list

After the fields are filled, click “Save”.

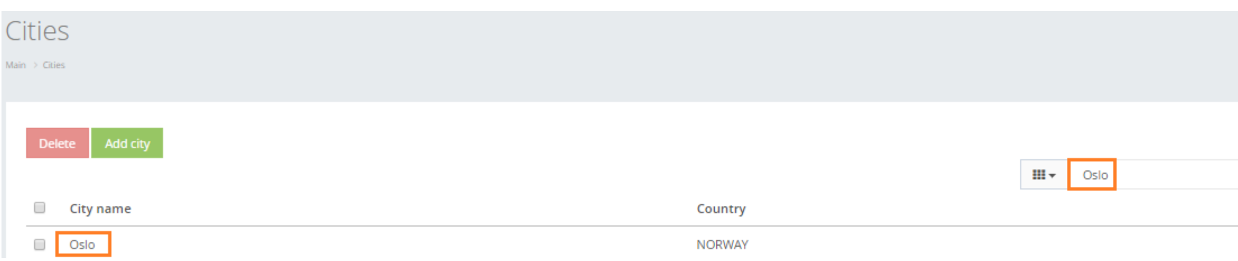


In general view of Cities you can see all cities that have been added to the list. A system user can create as many cities, as it needs for daily work.



User can filter data in the Cities database by using 2 methods:

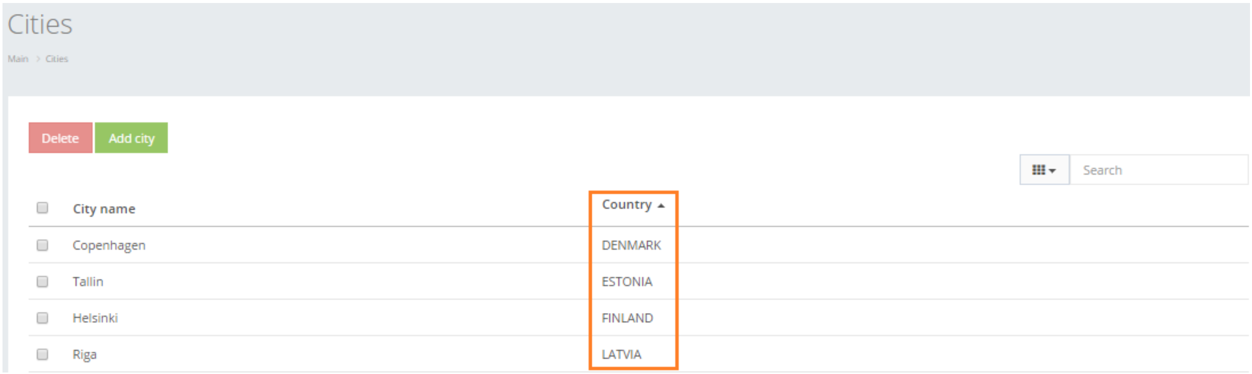
1. Type letters or numbers in “Search” field and click “Enter”



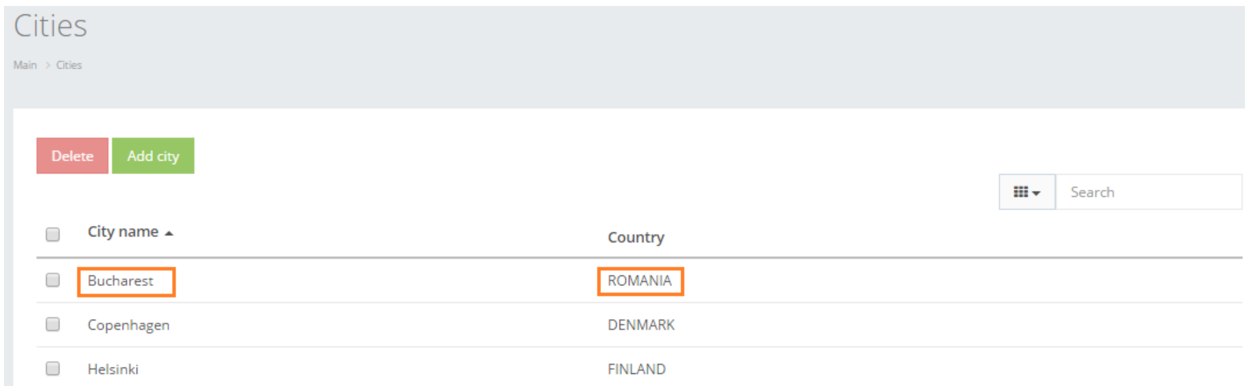
Cities can be searched by City name.

! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

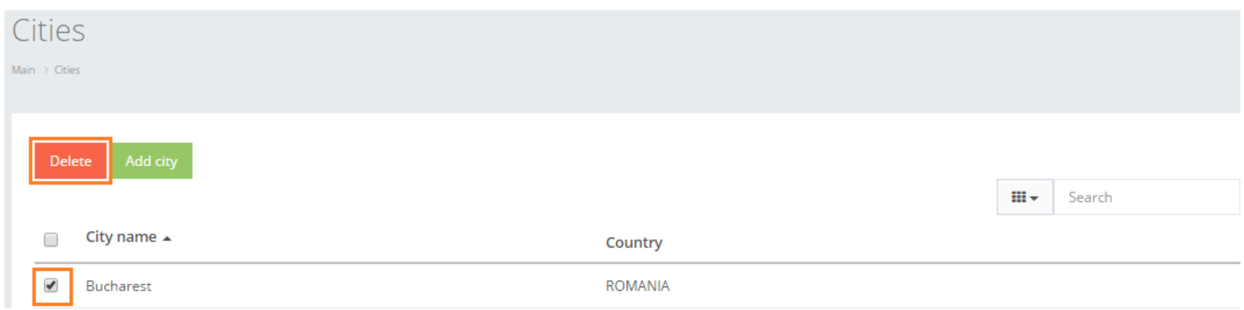
2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



Click on the text to browse City details.

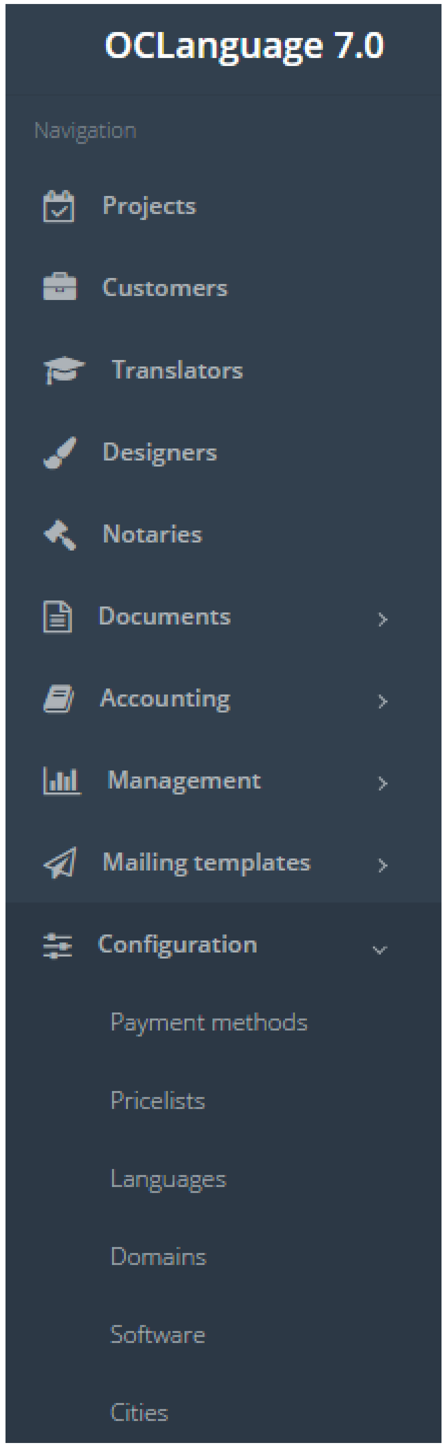


In order to remove a particular City, check the box next to the city that you want to delete and click "Delete".



3.11. Programs

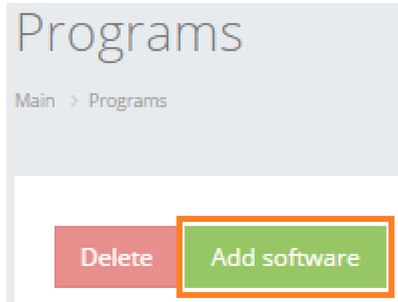
To manage a company branches list browse “Board -> Programs”.



The company offices are revealed in the following system sections:

- Translator’s data.

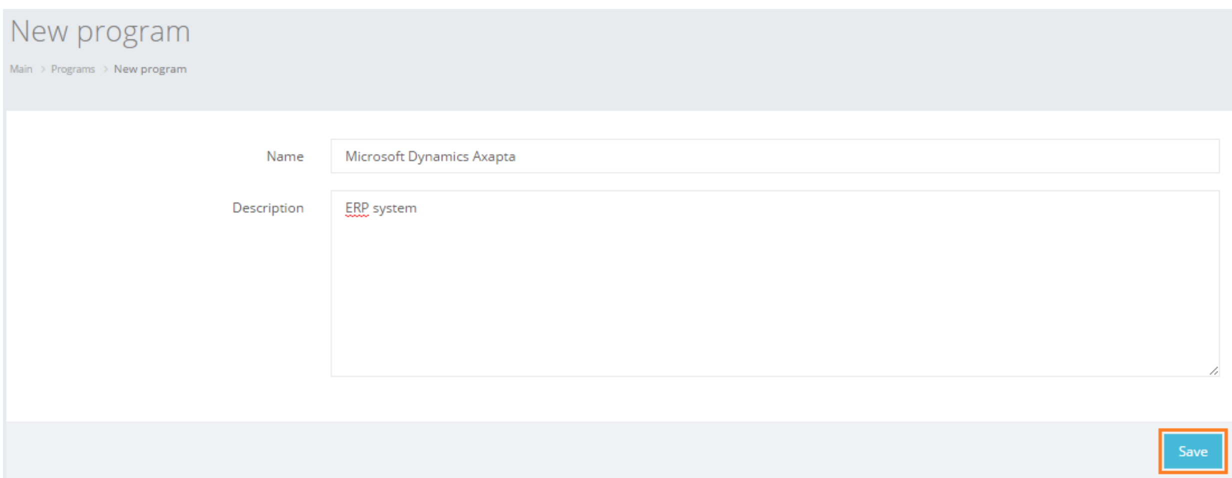
To add a software click “Add new software”.



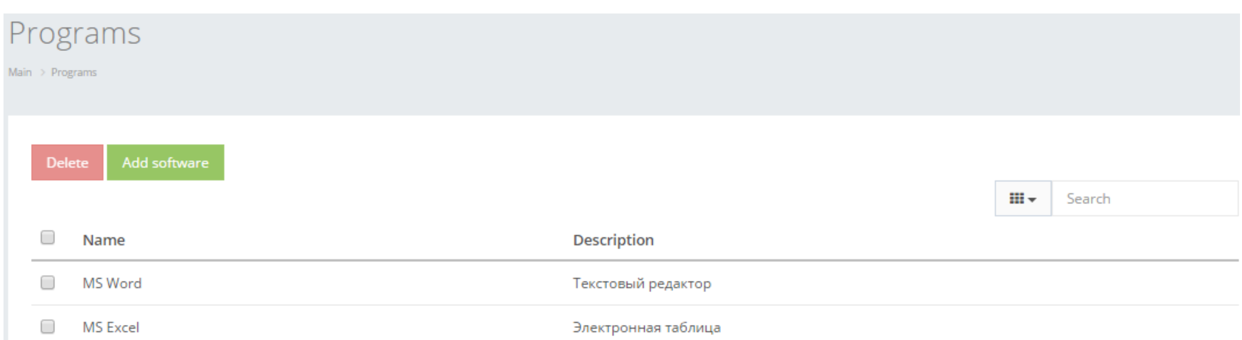
In the table below you can see the description of fields related to programs.

Field	**Description**
Name	Mandatory field – specify a program name (the one you will see further in the system)
Description	Provide description of the program

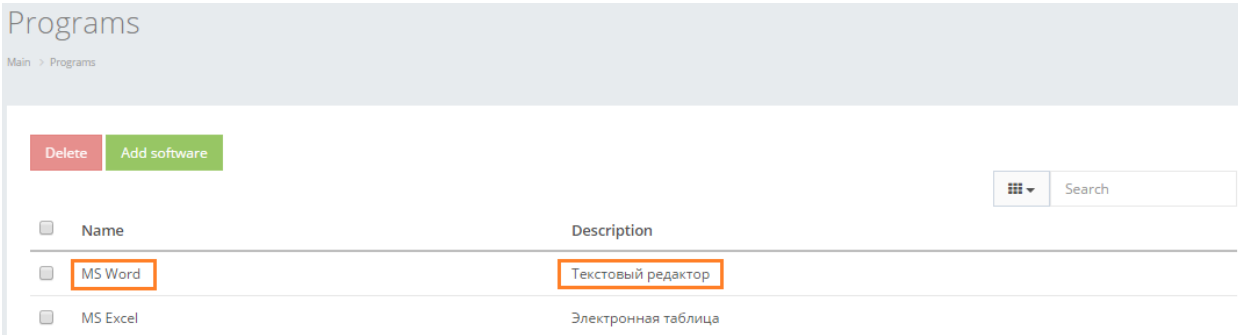
After the fields are filled, click “Save”.



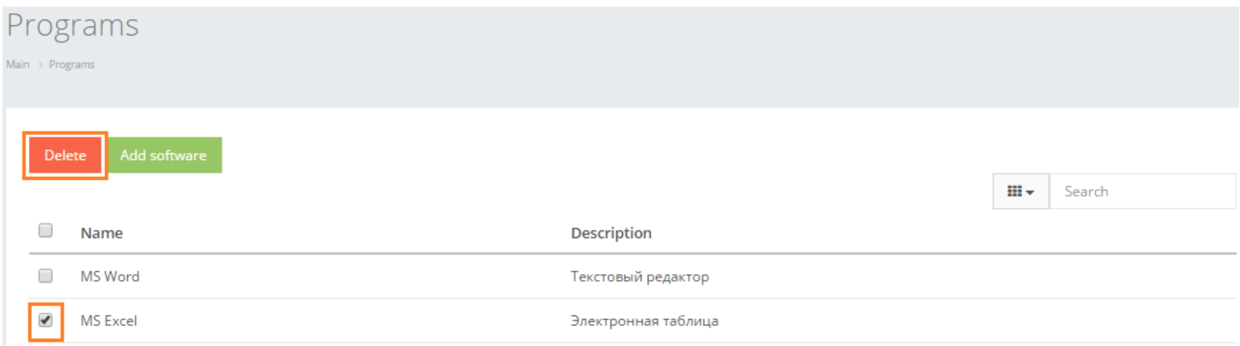
In general view of Programs you can see all software that has been added to the list.



Click on the text to browse Domains data.

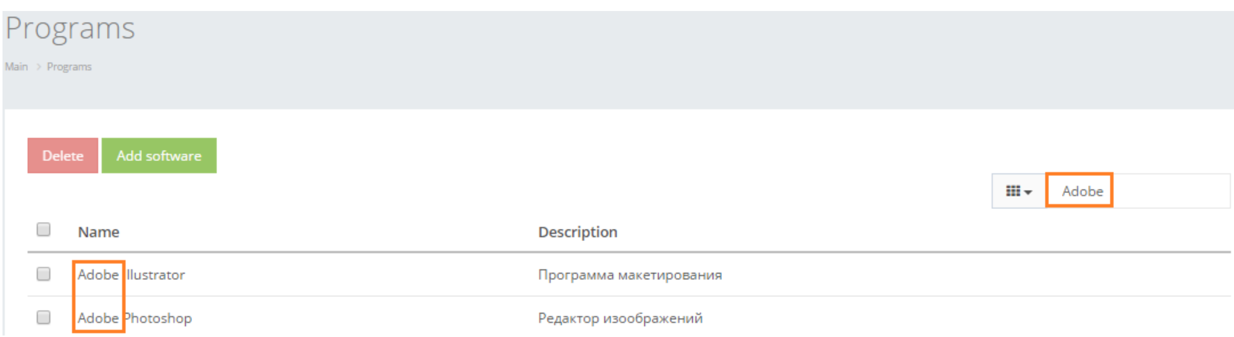


In order to remove particular Software, check the box next to the software that you want to delete and click “Delete”.



User can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

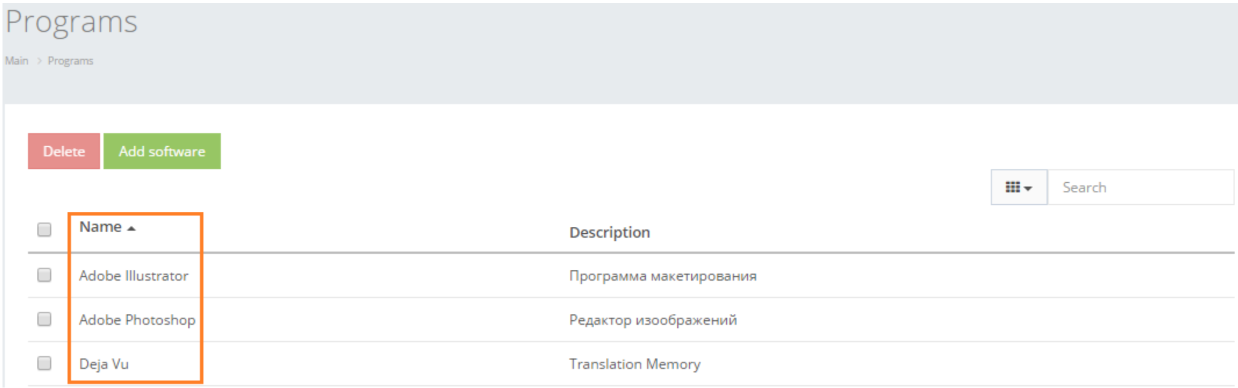


Below you will see a list of parameters (column names) the system searches data for:

- Name
- Description.

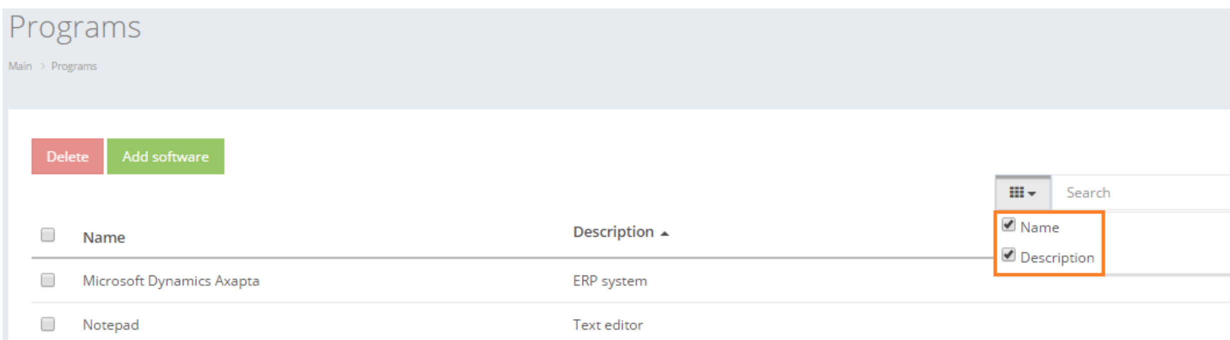
! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



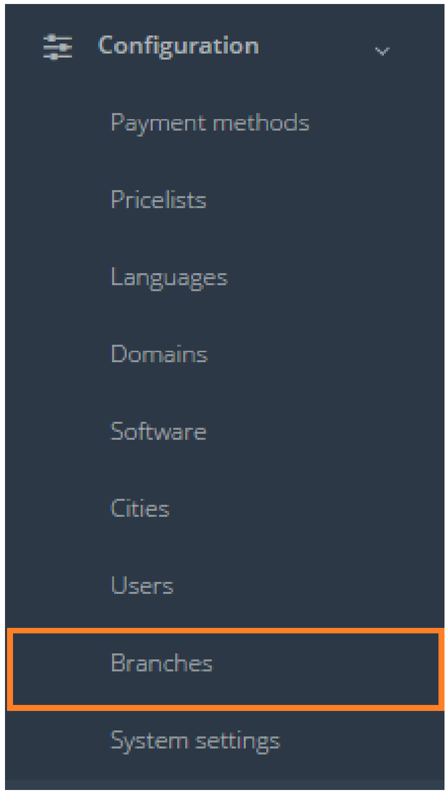
3. Review the columns that you want to see in the Software table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Software database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



3.12. Branches

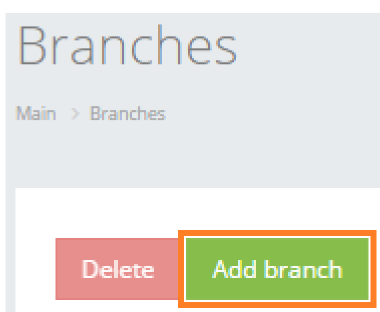
To manage a company branches list browse “Management -> Branches”.



The company offices are revealed in the following system sections:

- Customer’s data (linking Customer to one of the company’s branches)
- Adding new project (if a user chooses to create a new project from the Customer, which is not saved in the Customer database, the system will require the most important data about the Customer to be submitted, including the Branch).

To add a branch click “Add new branch”.

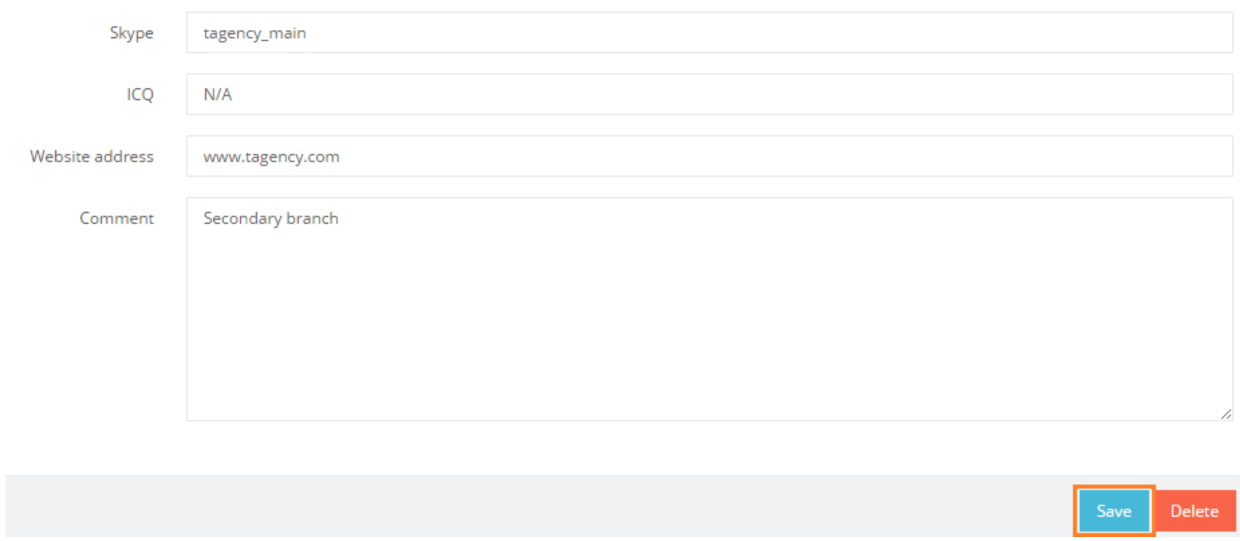


In the table below you can see the description of fields related to branch.

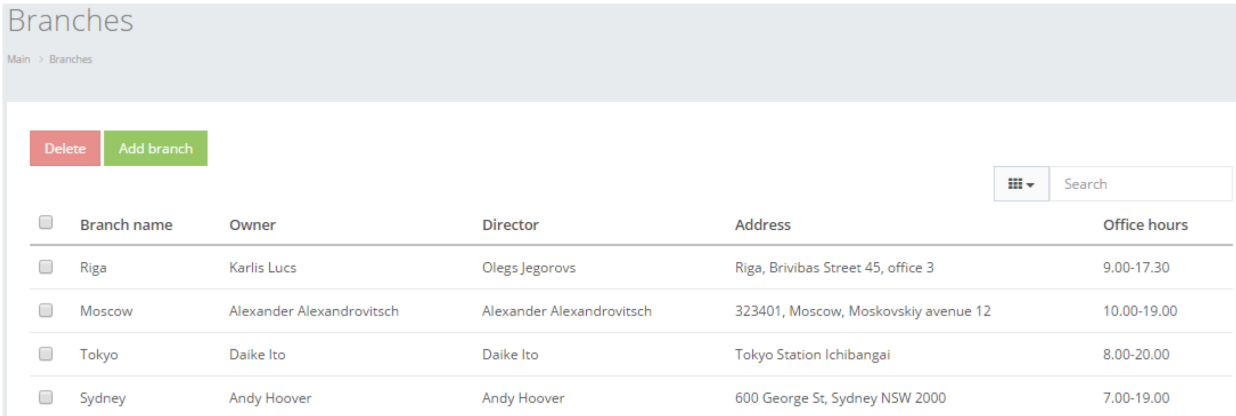
Field	Description
Branch name*	Mandatory field – specify a branch name (the one you will see further in the system)
Owner	Owner of the branch
Director	Director of the branch
Address	Address of the branch
Office hours	Working hours of the branch
Phone	Phone number
Mobile	Mobile number
Fax	Fax number
E-mail	E-mail address
Skype	Skype account name
ICQ	ICQ account name
Website address	Website address
Comments	Additional comments

All the fields below Branch name are for translation agency management reference, stored only in Branches section.

After the fields are filled, click “Save”.

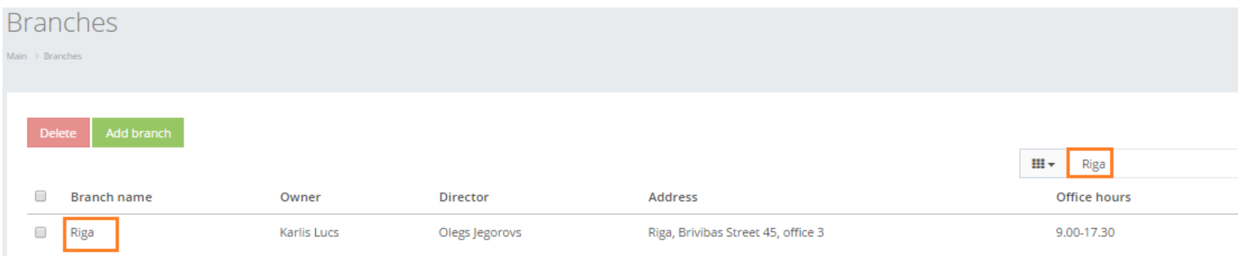


In general view of Branches you can see all offices that have been added to the list.



User can filter data in the Branches database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”

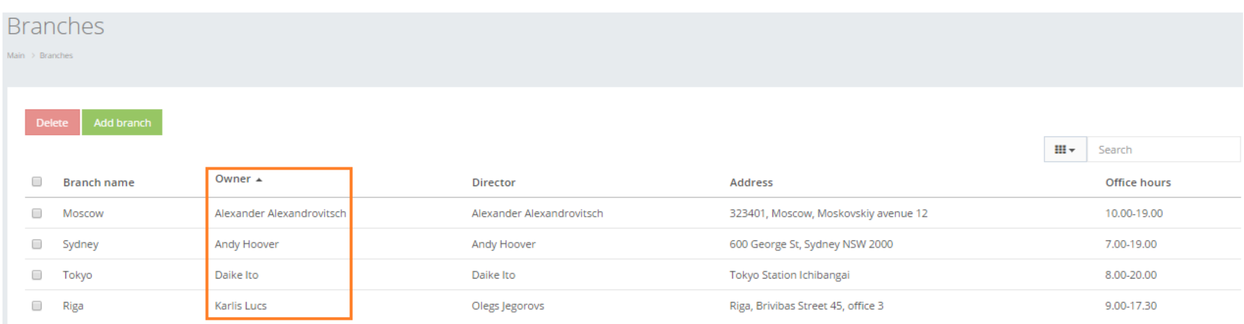


Below you will see a list of parameters (column names) the system searches data for:

- Branch name
- Owner
- Director
- Address
- Office hours.

! Please note that data filter can be removed by deleting the text in the “Search” field and clicking “Enter”.

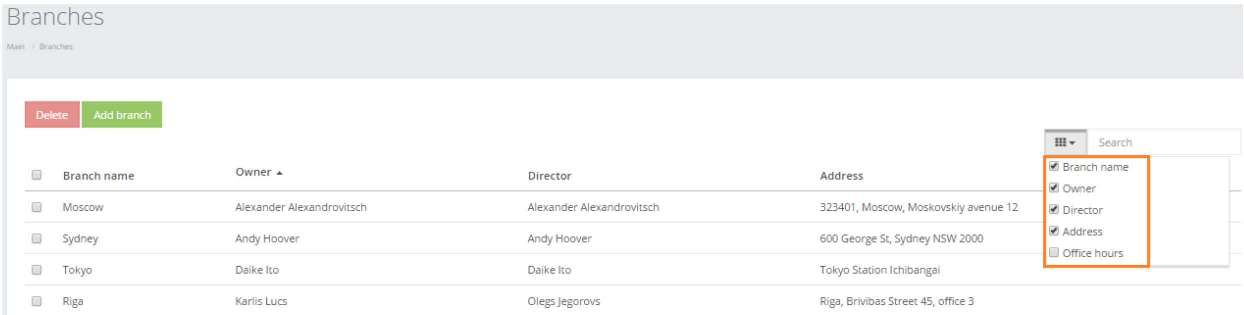
2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



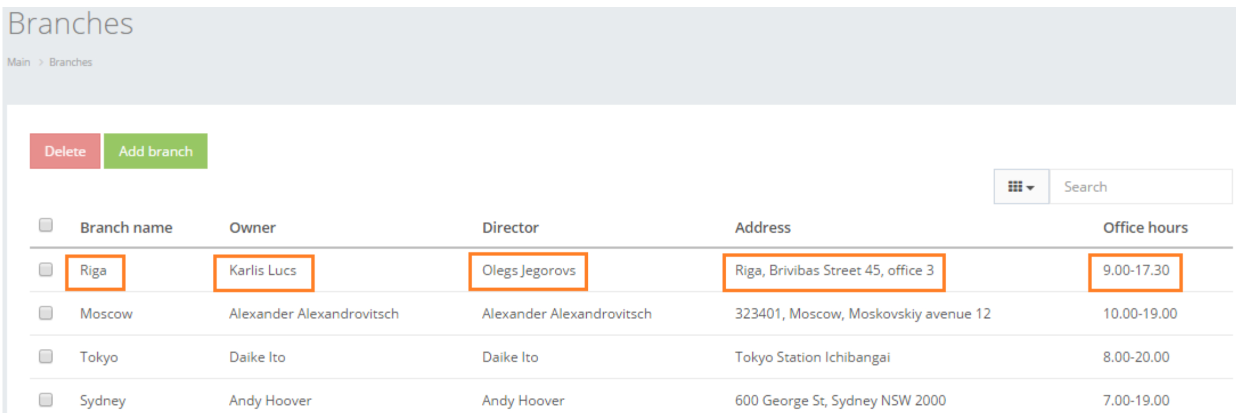
3. Review the columns that you want to see in the Branches table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want)

to view in the Branches database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

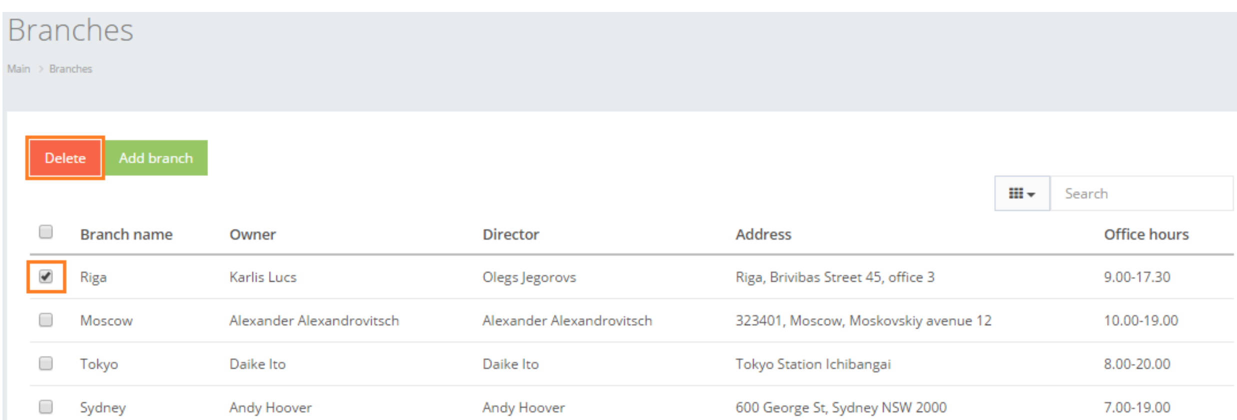
! Please note that the system will save these settings for upcoming user sessions.



Click on the text to browse Branch data.



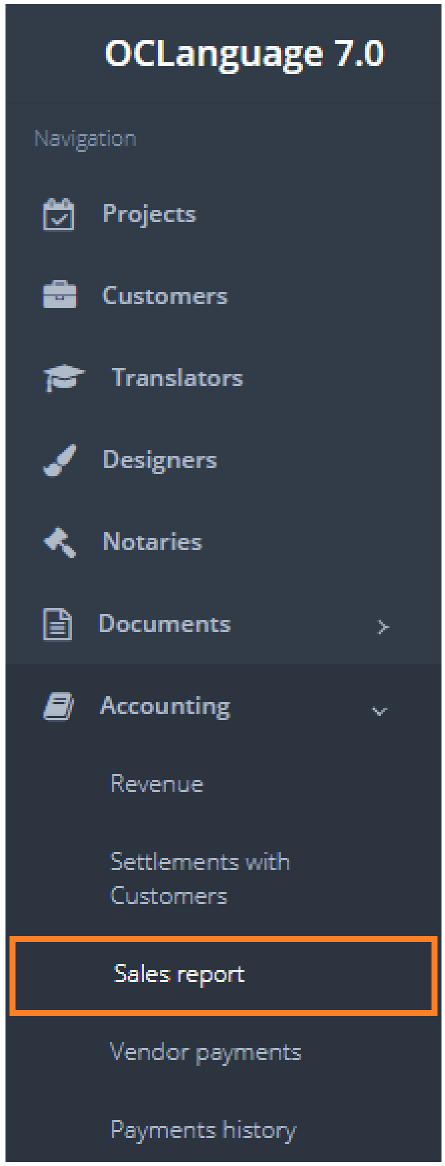
In order to remove a particular Branch, check the box next to the branch that you want to delete and click “Delete”.



4. Finance data management

4.1. Sales report

To browse Sales report click “Accounting -> Sales report”.



To gather statistics fill the data in the “Search” field. If no data is supplied and the user clicks “Search”, the system will not gather any data. This approach has been chosen to save the system resources while supplying the user with massive (and in most cases not needed) data amount.

In case you need to filter data by sorting information in a particular column from A to Z and vice versa by clicking on the column name.

Export

Project	Deadline	Languages	Type	Amount	Customer	Vendor	Manager	Price	Cost	Paid to vendor	Finished
17-001	27.07.2017	-	Written translation	7200 characters (calculation of original document)	Линкевич Ева		Veretina Maria	40.00 USD	10.00 USD	No	No
90-001	19.07.2017	ENG->HUN	Written translation	5 pages (calculation of original document)	Smith John	Fast translations Ltd.	Karlis	0.00 USD	60.00 USD	No	No

! Please fill in the data to minimize affect to system performance.

Every line in the Sales report replicates one task from the project section. For example, if you have 20 tasks in total for written translation in the project section (might be either under 1 project or many projects), then you should have 20 lines in the Sales report (if the box "Written translation" is checked and no other search parameters have been applied).

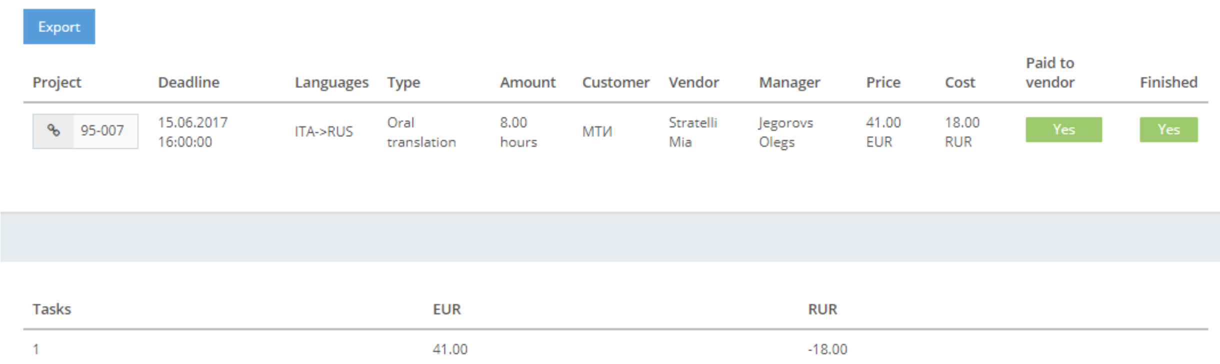
Search parameters are described in the table below.

Field	Description
Completion date from	Refers to project tasks deadline
Completion date to	Refers to project tasks deadline
Customer	Customer's name
Translator	Translator's name
Sworn translator	Sworn translator's name
Manager	Manager's name
Branch	Translation agency's name
Written translation	Check the box, if you are looking for written translation tasks
Oral translation	Check the box, if you are looking for oral translation tasks
Translator services	Check the box, if you are looking for translator services (selection, literary editing, validation, layout, proofreading) tasks
DTP	Check the box, if you are looking for layout design tasks
Notary certification	Check the box, if you are looking for Notary certification tasks
Sworn translator	Check the box, if you are looking for tasks that are handled by sworn translators
Other task	Check the box, if you are looking for other tasks (In tasks section the task type marked as "other")
Task paid to performer	Check the box, if you wish to see tasks with closed payments to vendors
Task completed	Check the box, if you wish to see payments for completed tasks

Written translation, translation services, DTP, Notary certification, sworn translation and other task – all of these are replica of written translation task types.

After the user has clicked "Search", the system supplies it with 2 tables:

- Sales transactions table
- Revenue/currency table.



Export

Project	Deadline	Languages	Type	Amount	Customer	Vendor	Manager	Price	Cost	Paid to vendor	Finished
95-007	15.06.2017 16:00:00	ITA->RUS	Oral translation	8.00 hours	МТИ	Stratelli Mia	Jegorovs Olegs	41.00 EUR	18.00 RUR	Yes	Yes

Tasks	EUR	RUR
1	41.00	-18.00

In the table below you can see the description of fields related to sales transactions.

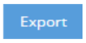
Column name	**Description**
Project	Equals to project <u>document</u> number
Deadline	Task deadline
Languages	Language pair
Type	Translation type (written/oral)
Amount (for the Customer)	Amount for the Customer (manager's specified amount of translation), data taken from task details Calculation from original/translated document – data taken from the project document's data
Customer	Customer's name
Vendor	Vendor's name
Manager	Responsible manager's name for the project (can be reviewed in general project data window)
Price	Price of the task (for the Customer)
Cost	Cost of task (honorarium to vendor)
Paid to vendor	Status of payment to vendor (yes/no)
Finished	Task status (yes/no)

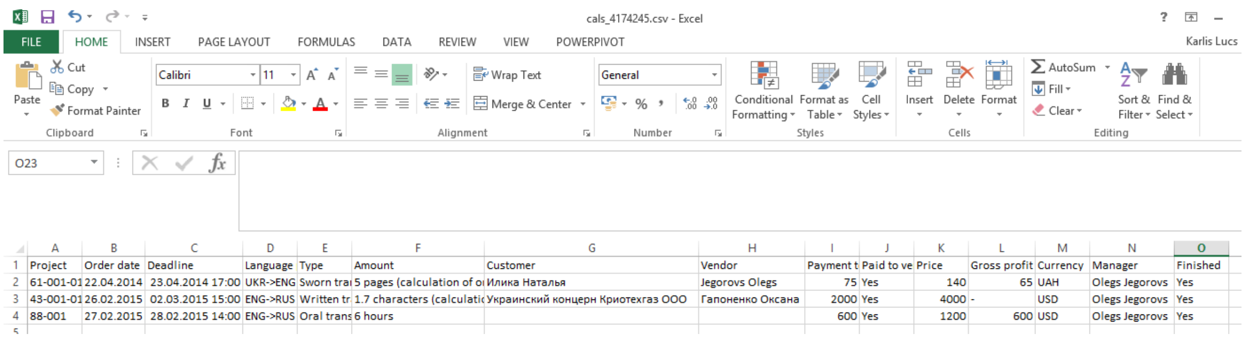
! Please note that for Sales transactions table the system reveals written and oral translation tasks in two separate tables.

Content of Currency table is straight forward described in the table below. Written and oral translation tasks are included in the same table of Currencies.

Column name	**Description**
Tasks	Task quantity

Price	Price in total for selected tasks
Cost	Cost in total for selected tasks
Gross profit	Gross profit in total for selected tasks

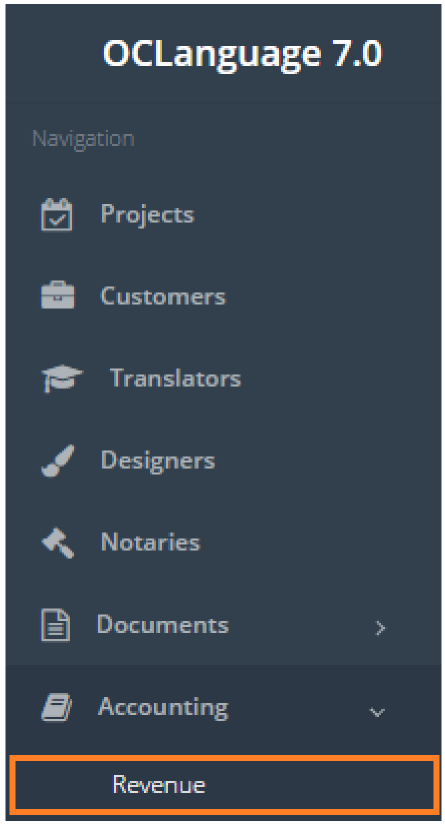
Click  icon to export data in .csv format (can be opened with Microsoft Excel). Below you can see the exported file in MS Excel.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Project	Order date	Deadline	Language	Type	Amount	Customer	Vendor	Payment t	Paid to ve	Price	Gross profit	Currency	Manager	Finished
2	61-001-01	22.04.2014	23.04.2014 17:00	UKR->ENG	Sworn tra	5 pages (calculation of o	Илика Наталья	Jegorovs Olegs	75	Yes	140	65	UAH	Olegs Jegorovs	Yes
3	43-001-01	26.02.2015	02.03.2015 15:00	ENG->RUS	Written tr	1.7 characters (calculati	Украинский концерн Криотехгаз ООО	Гапоненко Оксана	2000	Yes	4000	-	USD	Olegs Jegorovs	Yes
4	88-001	27.02.2015	28.02.2015 14:00	ENG->RUS	Oral trans	6 hours			600	Yes	1200	600	USD	Olegs Jegorovs	Yes

4.2. Revenue report

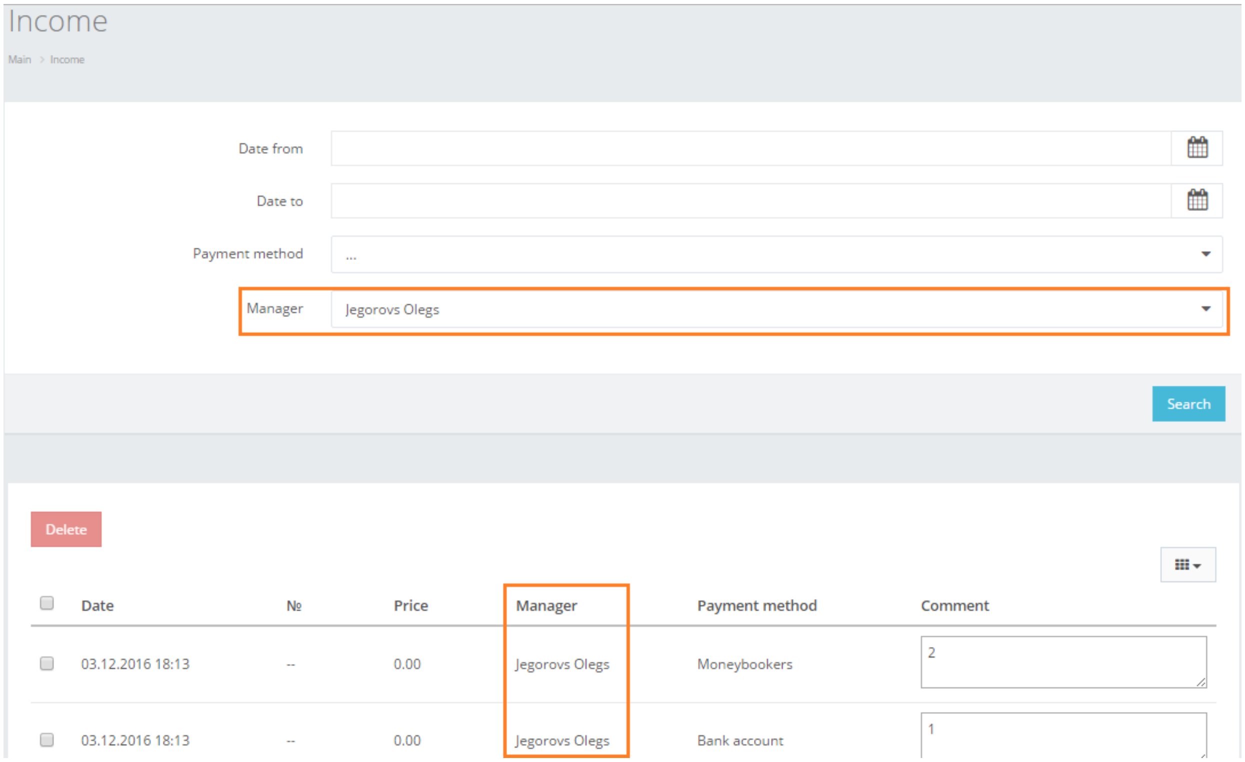
To view a report containing finance income related data, browse “Accounting” -> “Revenue” in the main menu.



To gather statistics fill the data in the “Search” field. If no data is supplied and the user clicks “Search”, the system will gather data taking into account a parameter, specified under Currency.

! Please fill in as much data as possible to minimize affect to system performance.

Every line in Income report replicates one task from the project section. For example, if you choose Manager “Olegs Jegorovs” and click the “Search” button, the system will supply you with all tasks, which were handled by Olegs Jegorovs.



Search parameters are described in the table below.

Field	Description
Date from	Date range from
Date to	Date range to
Payment method	Payment method used to process payment
Manager	Responsible project manager

System supplies the user with a table of income.

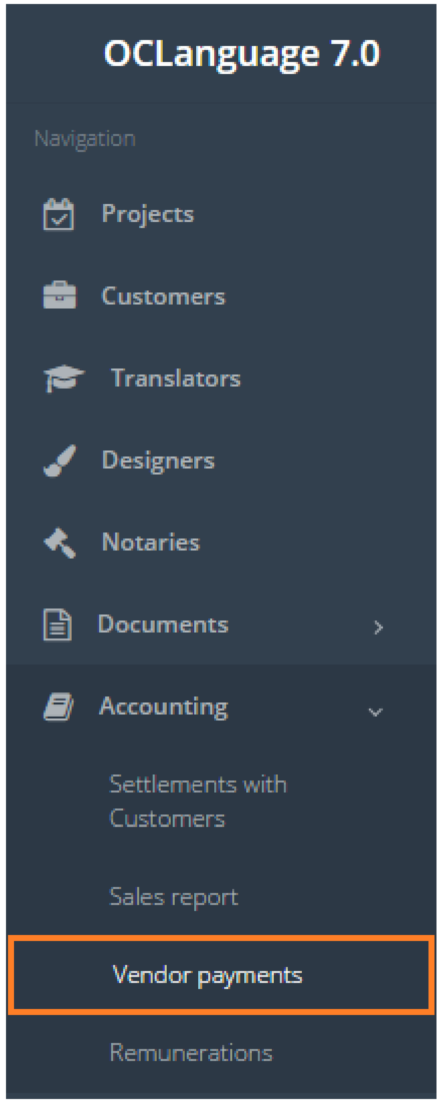
In the table below you can see the description of fields related to incomes.

Column name	Description
Date	Payment processing date
No.	Project No. with reference to the following: Customer No.; Project No.; Document No.
Price	Price for the Customer, data collected from task details (amount and currency from “Budget of task for Customer”)
Manager	Responsible project manager
Payment method (Bank account, Moneybookers etc.)	Payment methods are collected from the Payment methods table under the Board section. The system creates one column for one payment method.
Comment	Comment related to a particular payment

! Currency in the “Price” column stands for the *task budget in project data*. The system allows various combinations of general task budget and the actual payments by the Customer, possibly in different currencies. For example, the task budget might be 10,000 RUR, but the manager could receive a few payments from the Customer in USD.

4.3. Vendor payments report

To view a report containing payments related data, click “Accounting -> Vendor payments” in the main menu.



To gather statistics fill the data in the “Search” field. If no data is supplied and the user clicks “Search”, the system will reveal all payments that are pending.

! Please fill in as much data as possible to minimize affect to system performance.

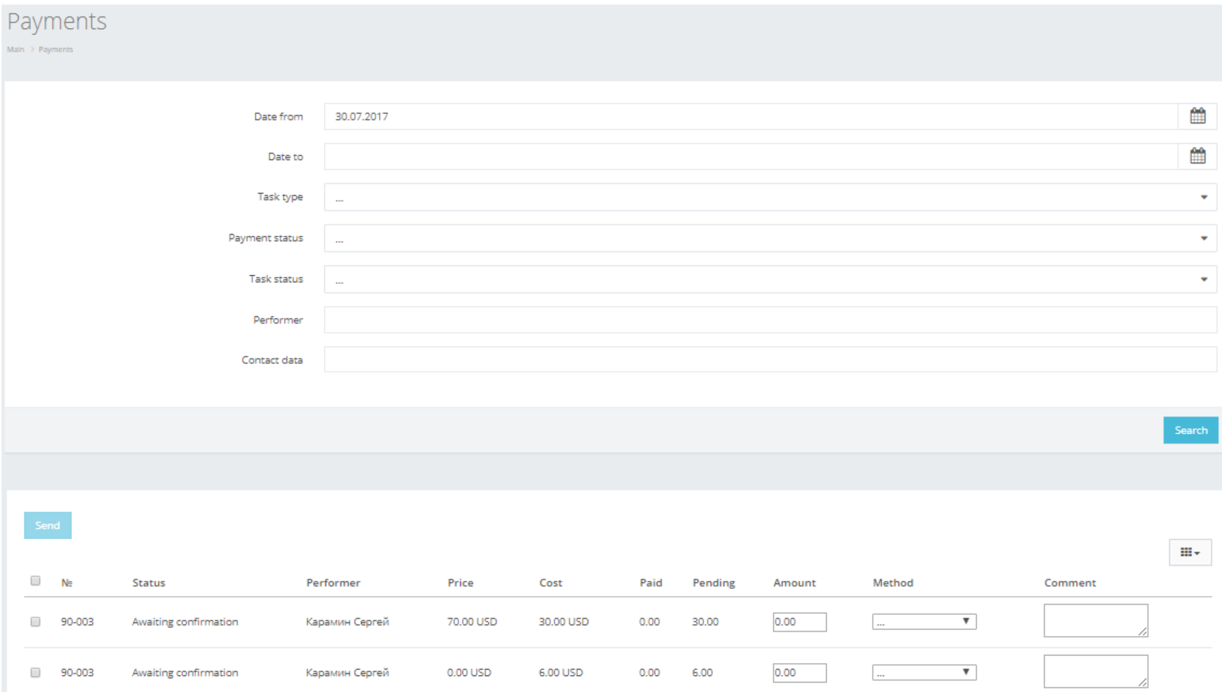
Every line in the Payment report replicates to one task from the project section. For example, if you have 20 tasks in total for the project section, then you should have 20 lines in the Payment report.

Search parameters are described in the table below.

Field	Description
Date from	Date range from (project creation data)
Date to	Date range to (project creation data)

Task type	Task type – equals to available task types in task details
Payment status	Status of payment (closed/pending)
Performer	Performer's name
Contact data	Contact data of vendor

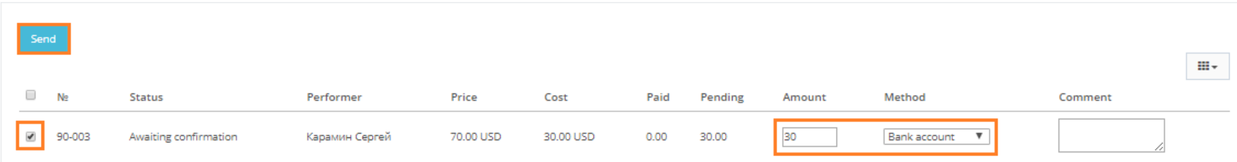
The system supplies the user with a table of payments.



In the table below you can see the description of fields related to payments.

Column name	**Description**
No.	Project No. with reference to the following: Customer No.; Project No.; Document No.
Status	Project status
Performer	Task performer (specified in task data)
Price	Price for the Customer
Cost	Cost or payment to the vendor
Paid	Closed amount of payment
Pending	Pending amount of payment
Amount	Specify payment amount
Method	Specify payment method
Comment	Leave a comment about the payment

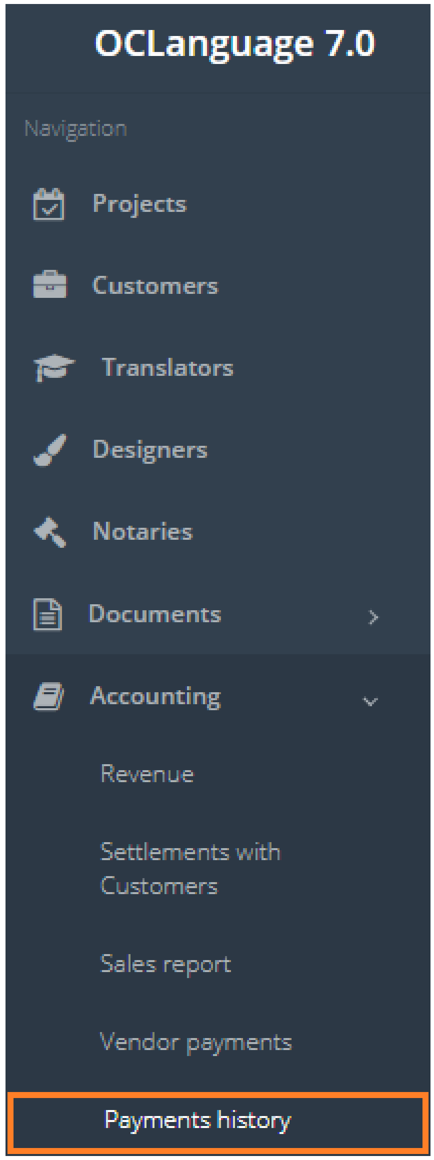
! Please note that payments can be saved in the "Payments" table only (in previous version of OCLanguage there was an option of saving payments data in the project details). In "Payments" section a user is not able to specify currency, it coincides with the currency from the “Cost” column. To save a new payment to the vendor, the user has to specify payment amount, choose payment method and click “Save”.



If a partial payment is made, the system deducts pending amount in “Payments” table, deducts pending amount in the second table, but leaves a record in the second table under “Outstanding payments” column.

4.4. Payments to vendors history

To view a report containing payments history data, browse “Accounting -> Payments history”.



To gather statistics fill the data in the “Search” field. If no data is supplied and the user clicks “Search”, the system will reveal all payments that are made.

! Please fill in as much data as possible to minimize affect to system performance.

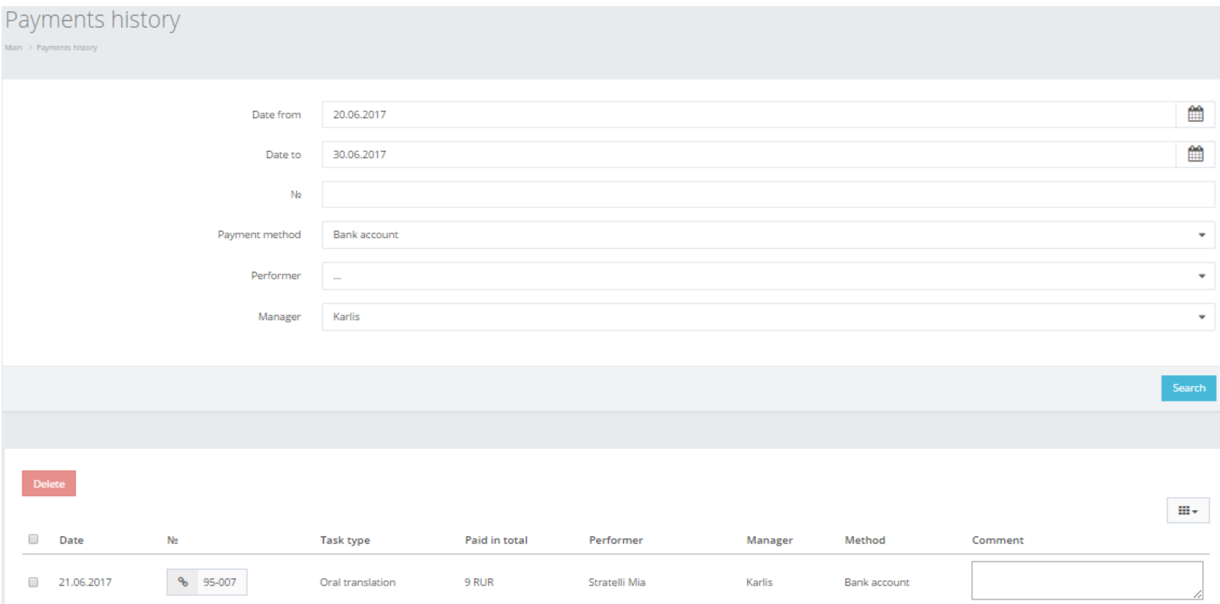
Every line in the Payment report equals to the payments made (it might be full or partial payment of one task).

Search parameters are described in the table below.

Field	Description
Date from	Date range from when the payment was made
Date to	Date range from when the payment was made

Task type	Type of performed task
Payment status	Specify payment status (closed/pending)
Performer	Performer’s name
Contact data	Contact data of vendor

The system supplies the user with a table of payments history.



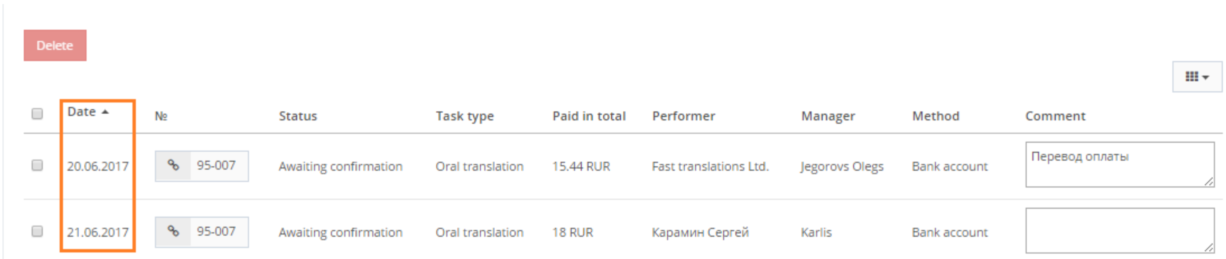
In the table below you can see the description of fields related to payment history.

Field	Description
No.	Project No. with reference to the following: Customer No.; Project No.; Document No.
Status	Project status
Performer	Performer’s name and surname
Price	Price for the Customer
Cost	Total payment amount to the vendor
Paid	Total amount that was paid to the vendor
Pending	Total amount that has not been paid yet
Amount	Payment amount
Method	Payment method (all payment methods options are collected from the Payment method table under Board section)
Comment	Manager’s comment to this payment

The main purpose of this section is to control the outgoing financial flow per particular date or period.

Besides the aforementioned option for searching data, the manager can use two more methods for gathering the required data:

1. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

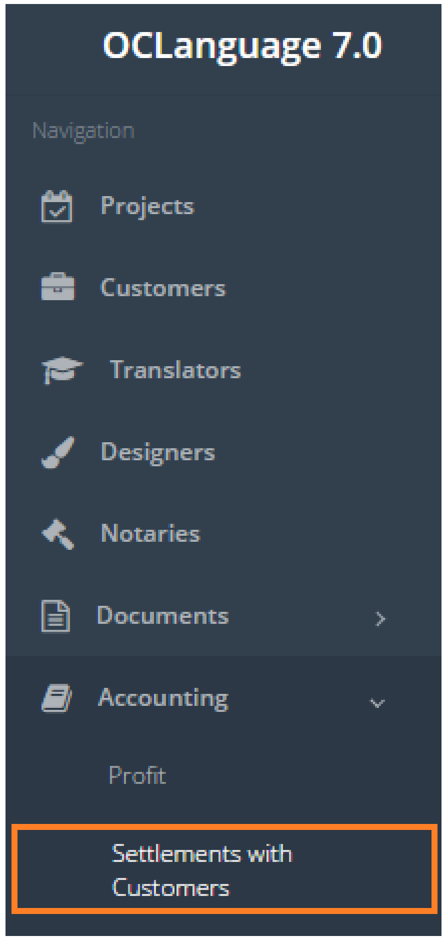


2. Review the columns that you want to see in the Payments history table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payments history database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

4.5. Settlements with Customers

To view business statistics data, click “Accounting -> Settlements with Customers” in the main menu.



To gather statistics fill the data in the “Search” field. If no data is supplied and the user clicks “Search”, the system will reveal all settlements with the Customer.

! Please fill in as much data as possible to minimize affect to system performance.

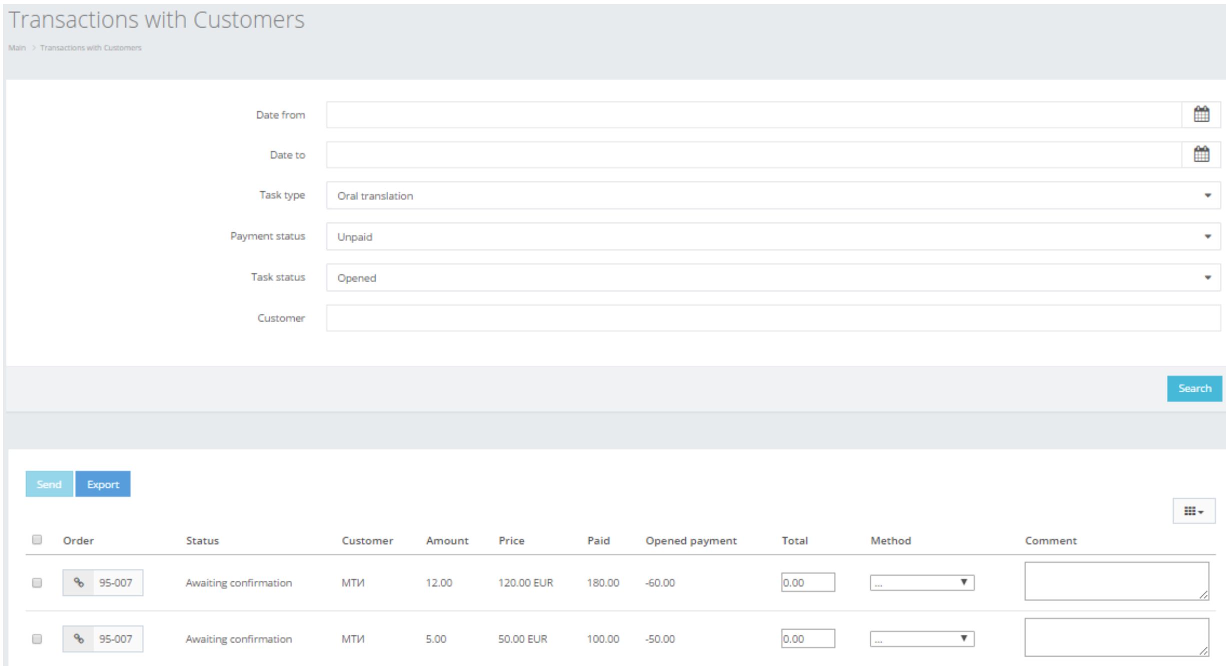
Every line in the Settlements report equals to a task (it might be full or partial payment of one task).

Search parameters are described in the table below.

Field	Description
Date	Order date
Order	Project number (consists of project and task number)
Status	Project task status
Customer	Customer’s name
Amount	
Price	Price for the Customer
Paid	Amount paid to the Customer
Opened amount	Opened amount to the Customer

Total	Specify total amount of payment

The system supplies the user with a table of payments history.



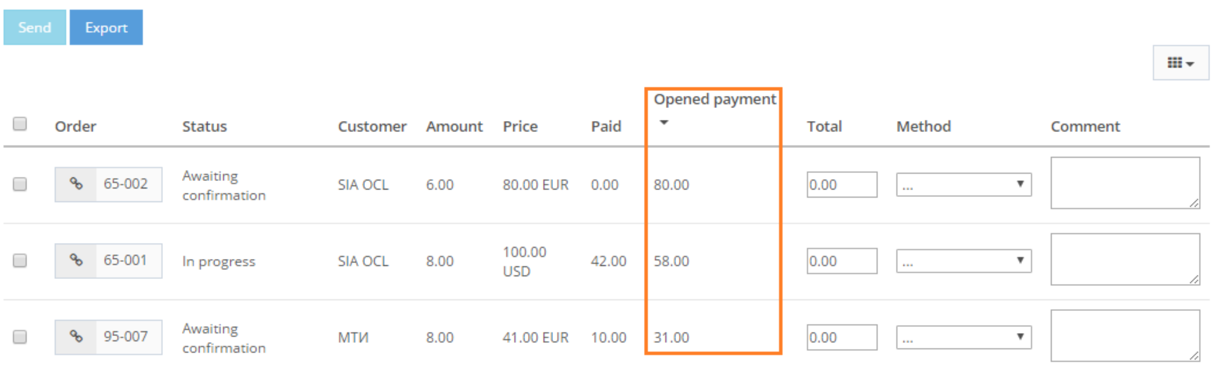
In the table below you can see the description of fields related to payment history.

Field	**Description**
Order No.	Project No. with reference to the following: Customer No.; Project No.; Document No.
Status	Project status
Customer	Customer's name and surname / company name
Amount	Project task amount (characters, words, pages, hours etc.)
Price	Price for the Customer
Paid	Total amount that was paid to the Customer
Opened payment	Total amount that has not been paid yet
Total	Payment amount
Method	Payment method (all payment methods options are collected from the Payment method table under Board section)
Comment	Manager's comment to this payment

The main purpose of this section is to save the incoming Customer payments and to control the incoming financial flow per particular date or period.

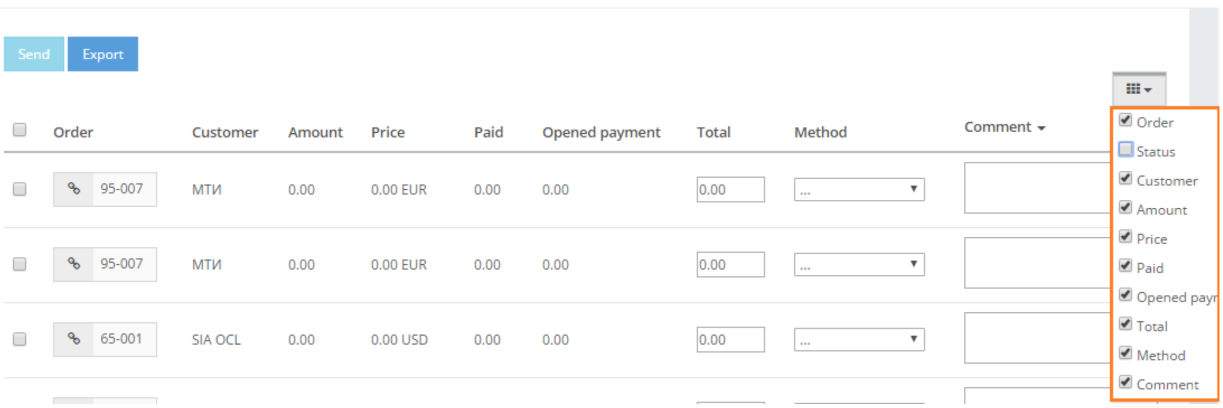
Besides the aforementioned option for searching data, the manager can use two more methods for gathering the required data:

1. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



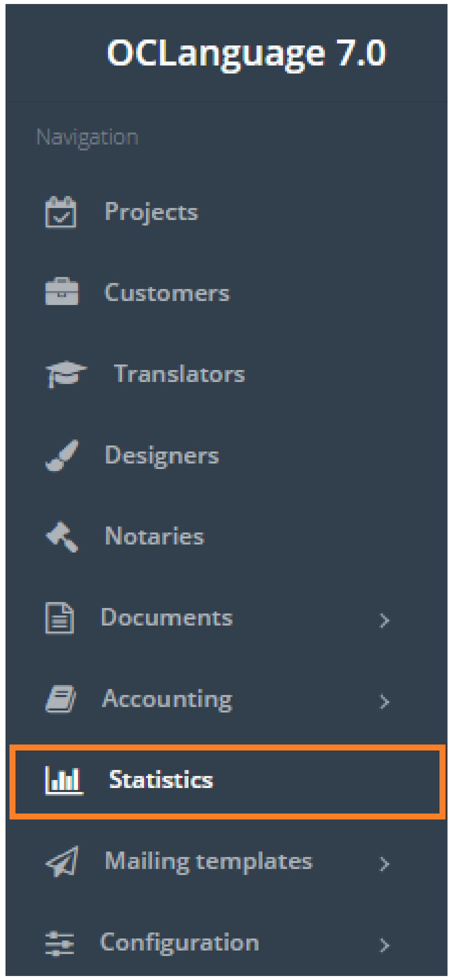
2. Review the columns that you want to see in the Payments history table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Payments history database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



4.6. Statistics

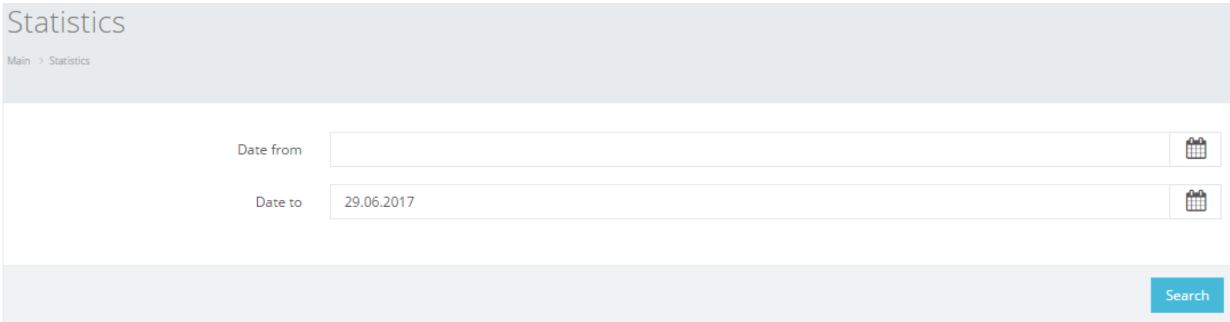
To view business statistics data, click “Statistics” in the main menu.



To gather statistics set the period start and end dates. The user can leave “start date” empty, but “end date” field should always be filled.

Search parameters are described in the table below.

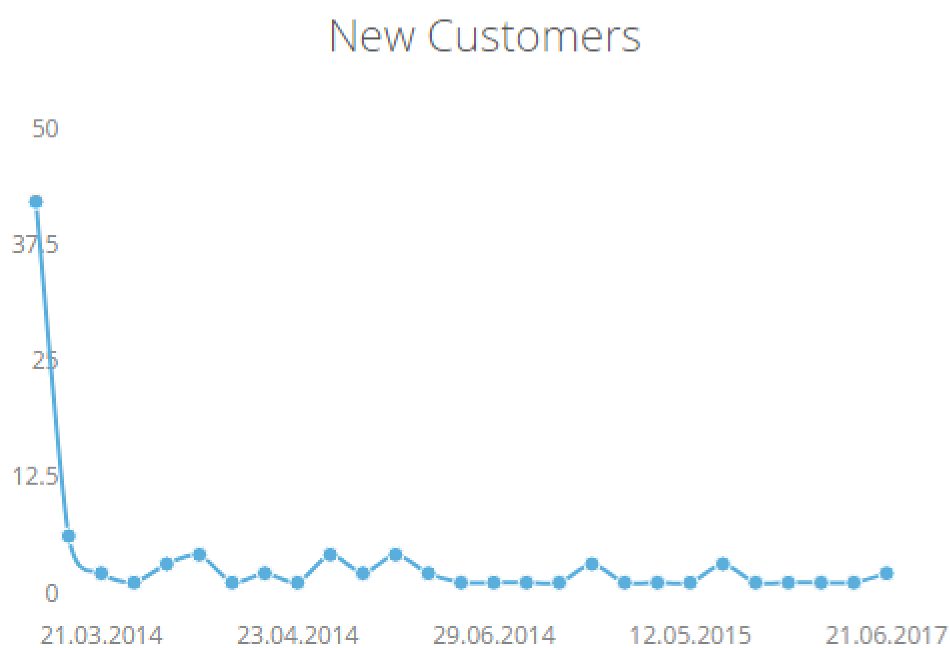
Field	Description
Date from	Date range from (period the user wants to gain data for)
Date to	Date range to (period the user wants to gain data for)



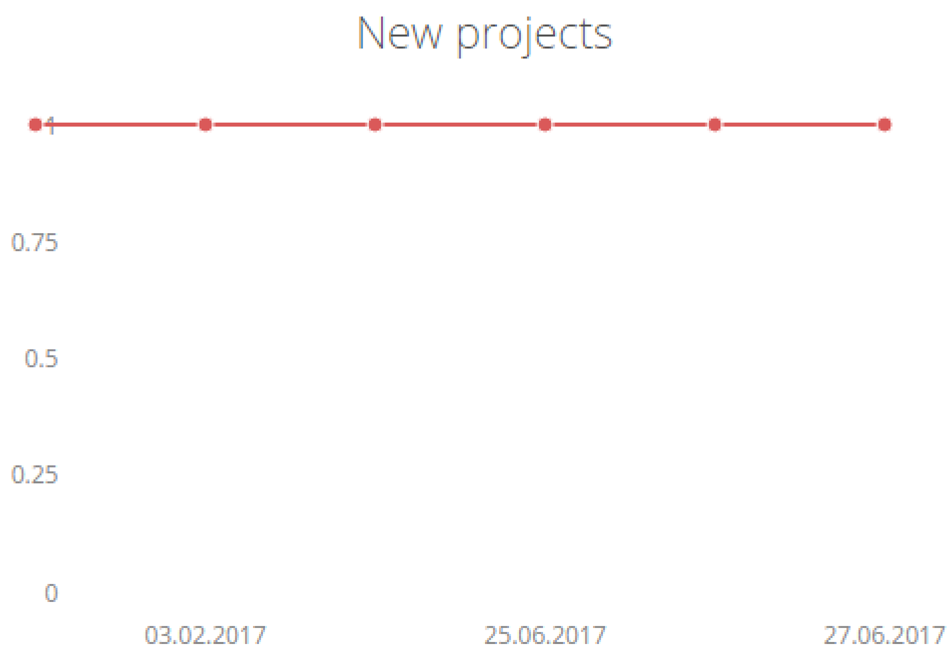
! Please fill in as much data as possible to minimize affect to system performance.

Statistics section consists of 10 charts, representing the main KPIs of translation agency business.

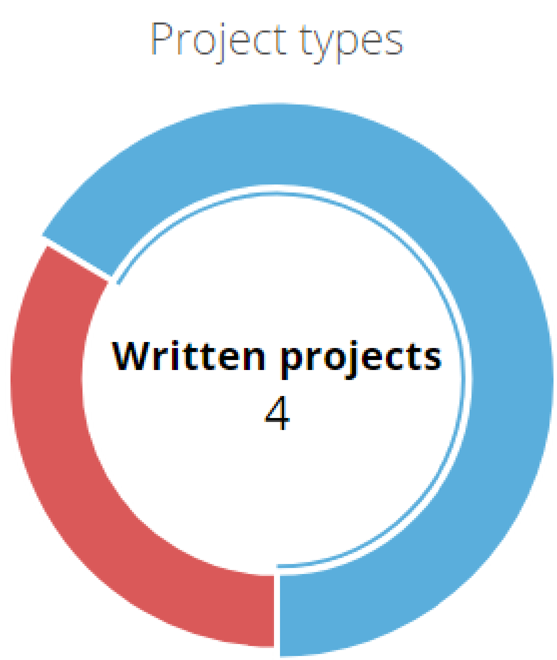
1. New Customers – the system counts the Customers as new ones, if they are registered in OCLanguage within the specified period in Search window. In brackets the user can see the total amount of Customers.



2. New projects – the system counts order (project) as new, if it was placed in OCLanguage within the specified period in Search window. In brackets the user can see the total amount of orders.



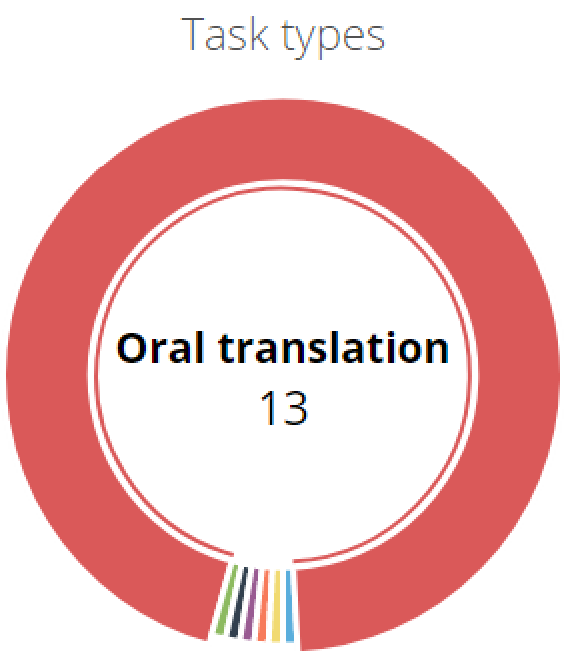
3. Project type – written/oral.



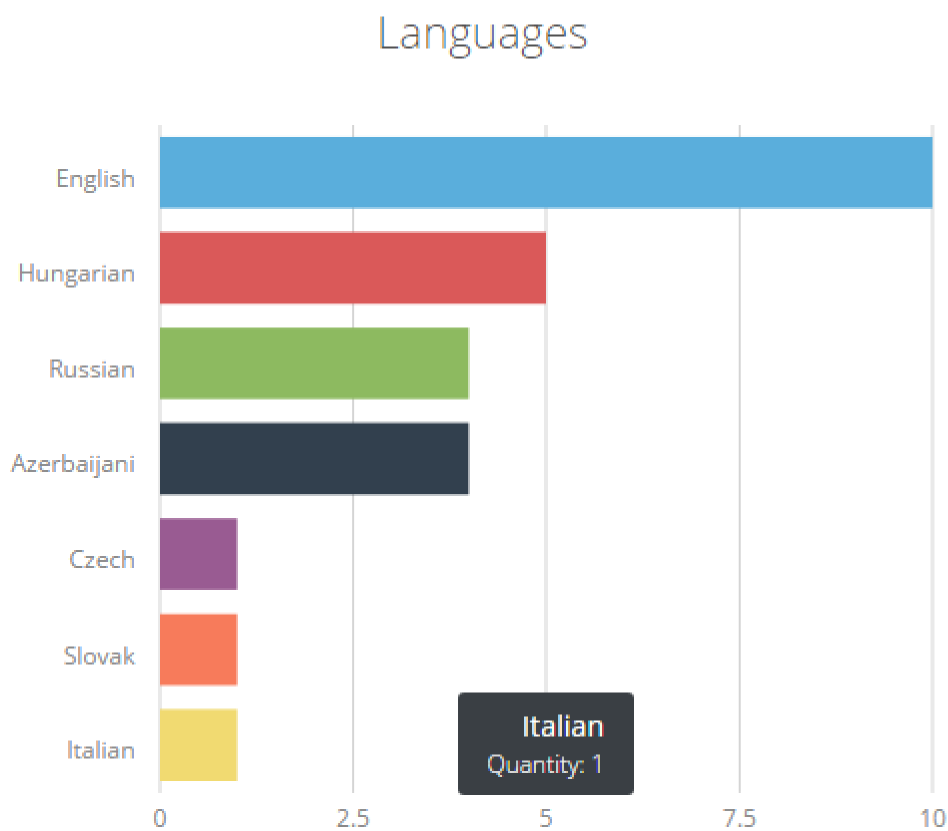
4. Task type – in the table below you can see the description of fields related to project tasks statistics.

Row name	Description
Oral translation	Oral translation task amount within specified period

Written translation	Written translation task amount within specified period
Translation services	Translator services (selection, literary editing, validation, layout, proofreading) task amount within specified period
DTP	DTP task amount within specified period
Notary certification	Notary certification task amount within specified period
Sworn translator	Task amount assigned to sworn translators (within specified period)
Other task	Other tasks amount within specified period



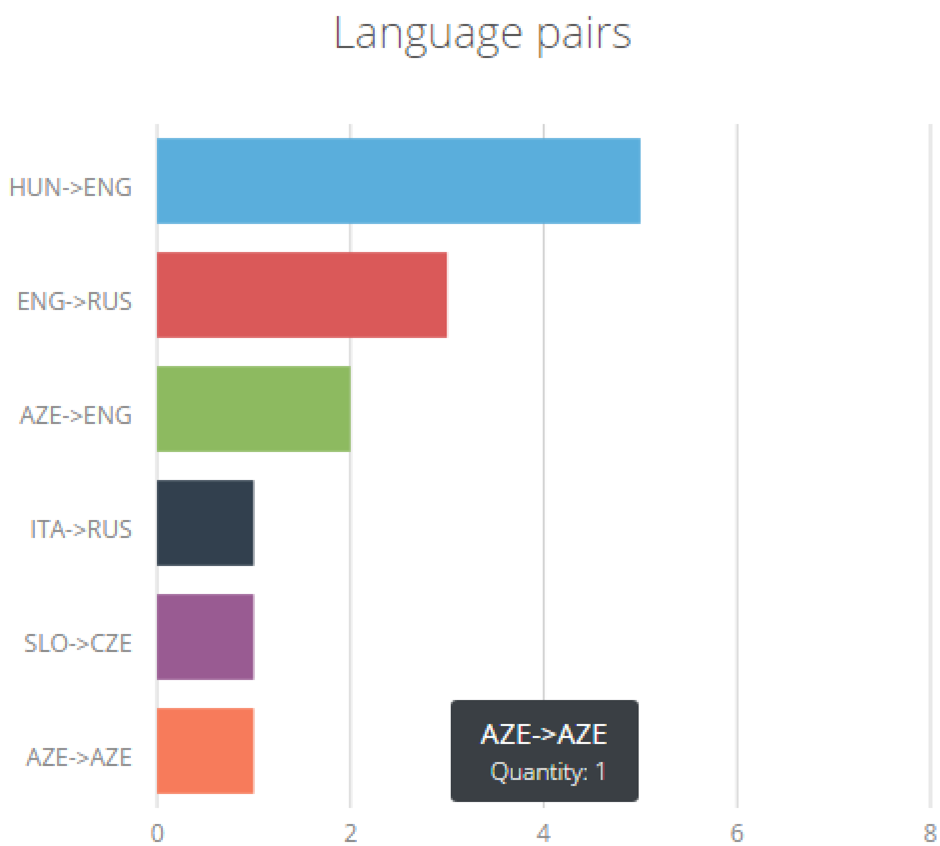
5. Languages



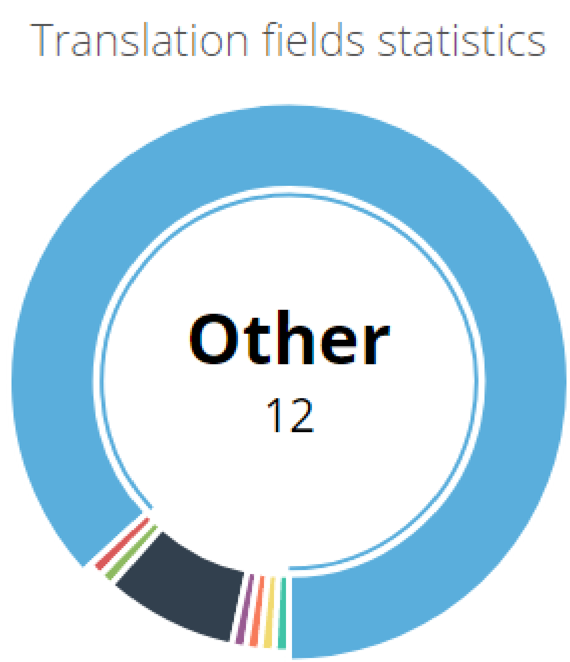
6. Language combinations

In the table below you can see the description of fields related to languages.

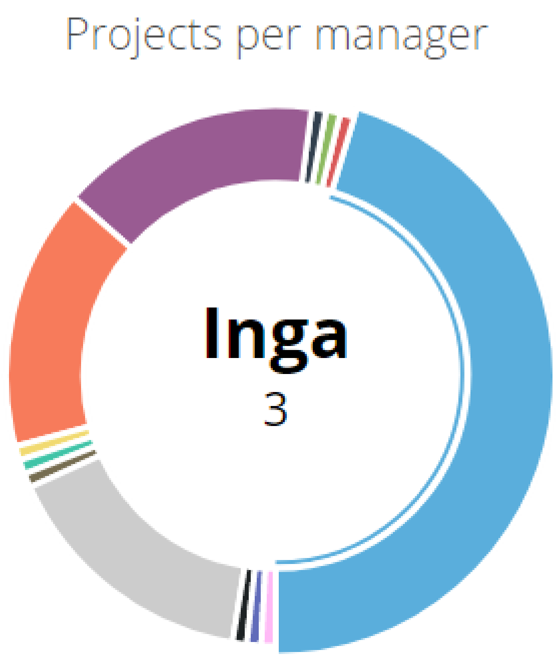
Column name	Description
Languages	All languages the company has done translation projects for within specified period
Language combinations	All language combinations the company has done translations for within specified period



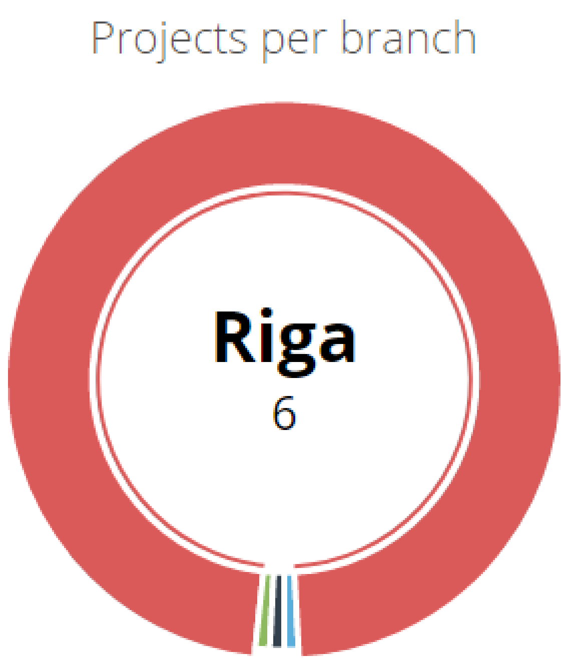
7. Translation fields – the translation field, specified in translation Document window under field "Translation type".



8. Projects per manager – total project quantity, assigned to a specific manager.

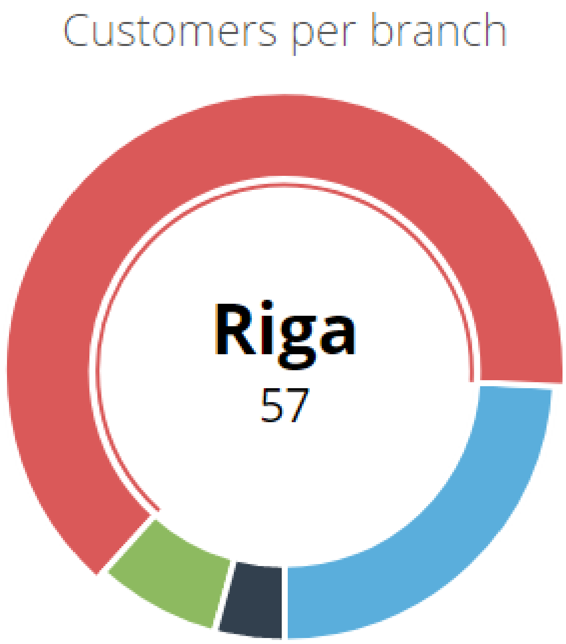


9. Projects per branch – total project quantity, assigned to a specific branch.



! Please note that if no branch is specified in the project, the system will not include the project in the branches statistics table.

10. Customers per branch – total quantity of the Customers belonging to a particular branch.



! Please note that the system counts budget of projects with all statuses.

! Please note that, if no manager is specified in the project, the system will not include the project in the branches statistics table.

5. System documents management

5.1. Invoices

OCLanguage represents a tool for autonomic creation of Commercial Invoices (CI).

After invoice creation, the user can download the created CI either with pre-built signature and stamp ( ) or without them ( ) and send it to the Customer manually or let the system autonomically send the issued invoice to the Customer ( ) (for more information about invoice creation see manuals: “7.7 Ho to issue invoice for project” and “7.8 How to send invoice to Customer”).

During implementation process, our specialists will add translation agency company data in the template of invoice. The table below reveals the data that is included in the invoice.

Data	**Description**
Logotype and company details	This information is set up during implementation process
Supplier	Translation agency company details
Recipient	Customer name, who receives a translated document
Payer	Company or Private person’s name, who pays an invoice
Commercial invoice No.	Commercial Invoice number with reference to invoice date
Task #	Task number
Service type	Service type, gathered from task details
Unit of measure	Choose unit of measure, either of symbols/document/words/pages
Amount	Specified volume of service
Price	Price per unit
Total	Total price of the task
Without VAT	Total payment amount, to which VAT is not applicable
Total services quantity	Total quantity of tasks, included in the invoice
Amount in words	Total payment amount in words
Issued	Translation agency representative, who signs the invoice

Below you can see the sample of invoice.

GRAFIT
TULKOJUMU BIROJS

Zaubes Street 7-2, Riga, Latvia
Tel.: (+371) 22332787
Fax: (+371) 67375087
E-mail: info@grafit.lv

Due date: 12.08.2017

Vendor: SIA GRAFIT
Registration No: 40003999836
VAT payer code: LV40003999836
Legal address: Stirnu 1-84, Riga, LV-1035
Agency address: Zaubes Street 7-2, Riga, LV-1013
A\S SWEDBANK
Account No: LV20HABA0551019640120
SWIFT: HABALV22

Payer:

Invoice GR_2069 on 02.08.2017

No.	Service	Unit	Quantity	Price	Total
1	Bankas dokuments	Pages	3.9	14	54.60
				Total:	**54.60**
				VAT 21%:	**11.47**
				In total:	**66.07**

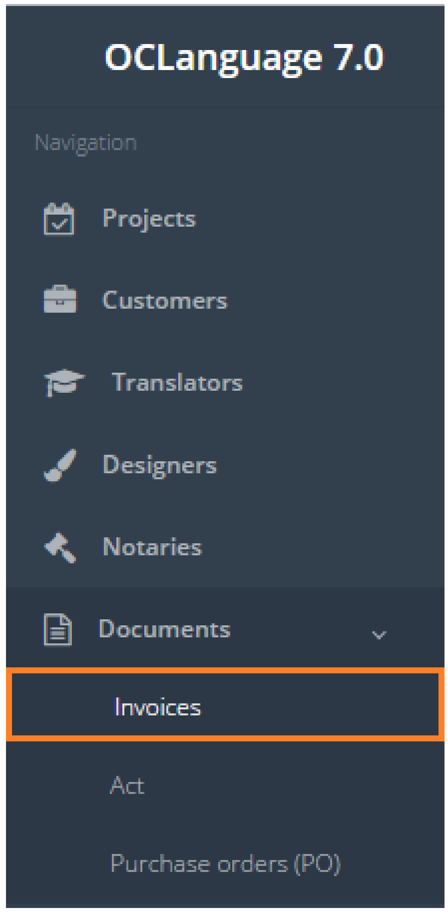
In total services 1, for amount: 66.07 with VAT
Sixty-six point seven EUR

Issued: Marija Konstantinova

Received: ____________________

SABIEDRĪBA AR IEROBEŽOTU ATBILDĪBU
GRAFIT
LATVIJAS REPUBLIKA

To manage an invoices list, browse “Documents -> Invoices”.

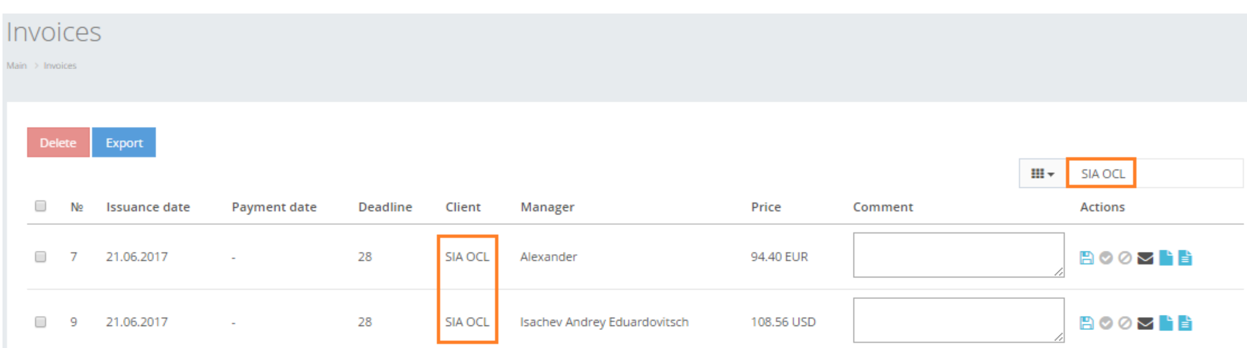


Invoices are revealed in the following system sections:

- Projects

The user can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”



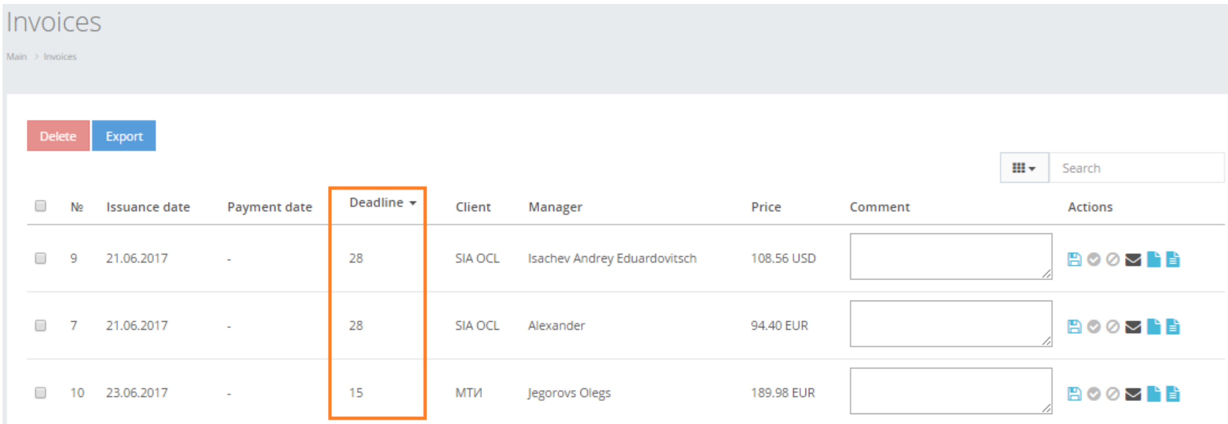
Below you will see a list of parameters (column names) the system searches data for:

- Issue #

- Customer
- Comment.

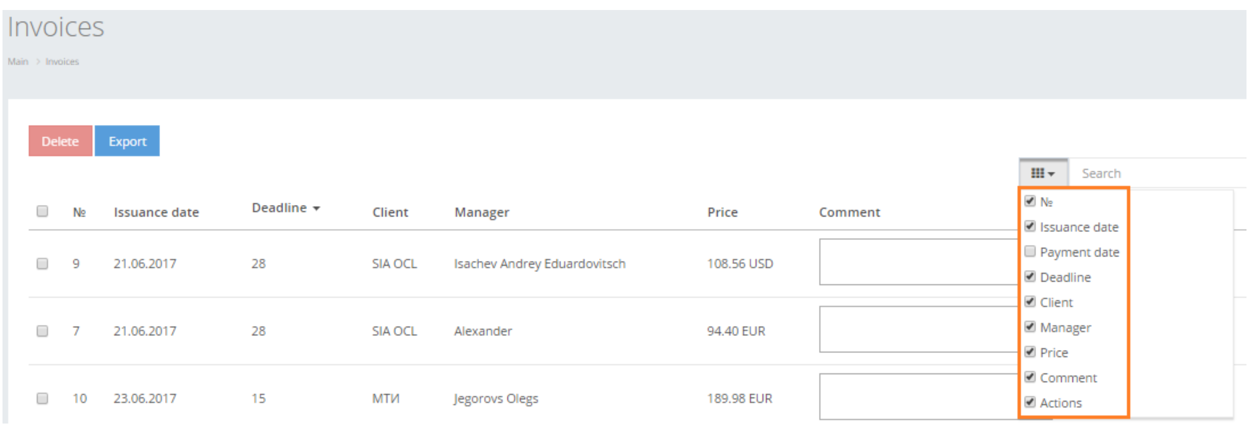
! Please note that data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



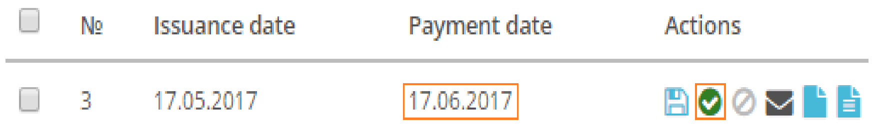
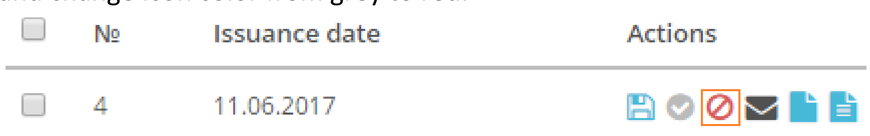
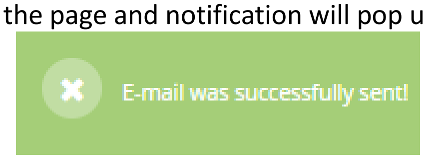
3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Invoices database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

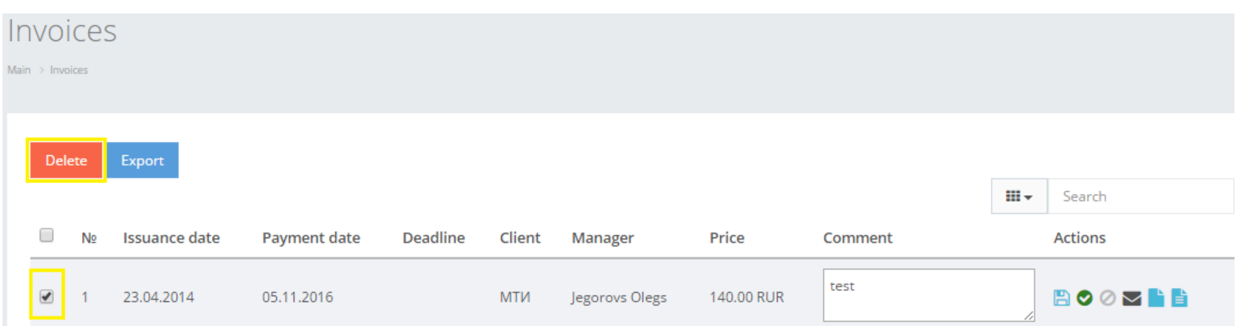


The table below reveals the data of columns from invoices section.

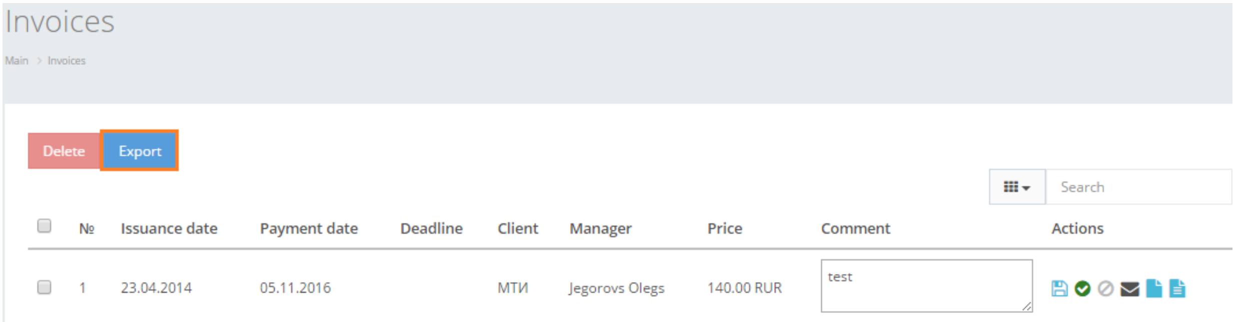
Column name	**Description**
№	Unique number of invoice
Issuance date	Invoice issuance date
Payment date	Invoice payment date
Deadline	Project deadline (amount of days)
Client	Customer name
Manager	Manager name
Price	Payment amount

Comment	Manager’s comment related to invoice
Actions	List of actions related to a particular invoice (the system reacts upon click on the icon)
Save comment ( )	Comment that one user wants to save
Invoice paid ( )	Mark the invoice as paid by Customer. After clicking the icon, the system will ask, if the user is sure about marking the invoice as paid; reload the page; put the date in “Payment date” column and change icon color from grey to green. 
Invoice cancelled ( )	Mark the invoice as cancelled. After clicking the icon, the system will ask, if the user is sure about marking the invoice as cancelled; reload the page and change icon color from grey to red. 
Send invoice over e-mail ( )	Click to send invoice to the Customer’s e-mail address. After clicking the icon, the system will ask, if the user is sure about sending the e-mail; reload the page and notification will pop up. 
View invoice ( )	Open the invoice in .pdf format
View signed invoice ( )	Open the signed invoice in .pdf format

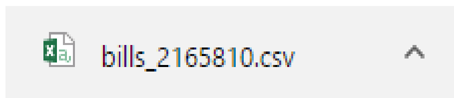
In order to remove a particular invoice, check the box next to the invoice(s) that you want to delete and click “Delete”.

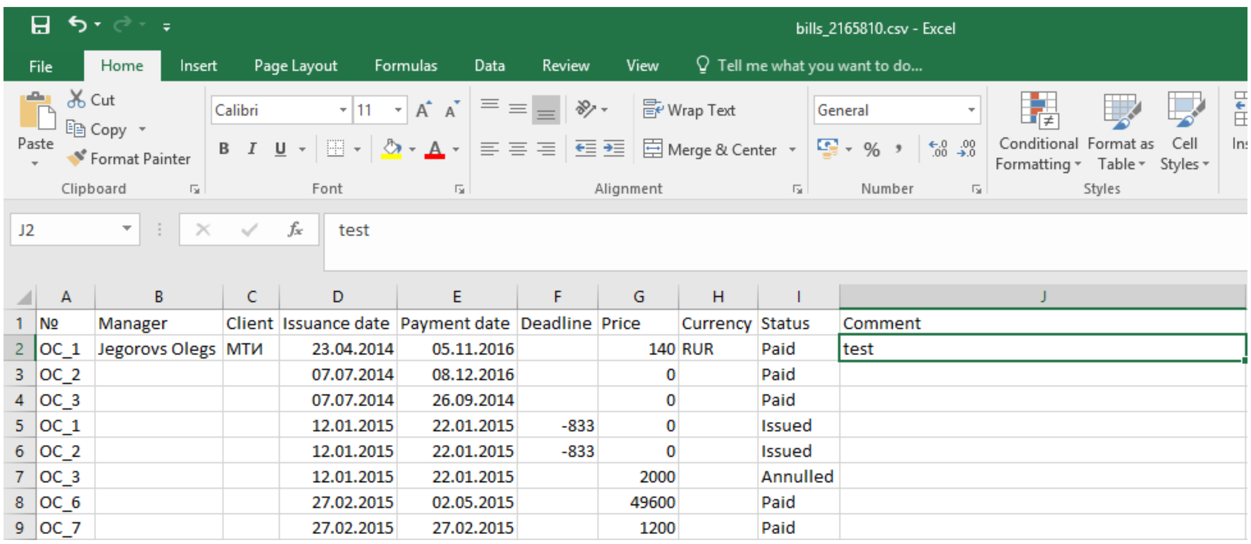


In order to export full table of invoices click “Export”.



The system will autonomically generate .csv file.





№	Manager	Client	Issuance date	Payment date	Deadline	Price	Currency	Status	Comment
OC_1	Jegorovs Olegs	МТИ	23.04.2014	05.11.2016		140	RUR	Paid	test
OC_2			07.07.2014	08.12.2016		0		Paid	
OC_3			07.07.2014	26.09.2014		0		Paid	
OC_1			12.01.2015	22.01.2015	-833	0		Issued	
OC_2			12.01.2015	22.01.2015	-833	0		Issued	
OC_3			12.01.2015	22.01.2015		2000		Annulled	
OC_6			27.02.2015	02.05.2015		49600		Paid	
OC_7			27.02.2015	27.02.2015		1200		Paid	

5.**2. Purchase orders (PO)**

OCLanguage represents a tool for autonomic creation of Purchase Order (PO) document.

The user is able to download created PO and send it to the vendor manually or let the system autonomically send issued POs to the vendor (for more information see "7.14. How to issue PO document for vendor").

PO is adjusted to translation agency template. The table below reveals the data that is included in PO.

Data	Description
Logotype and company details	Set up during implementation process
Task	General document No. (to which this task belongs) from project details
Executor	Vendor, to whom this PO is assigned
Date	PO issuance date
Price	Price for translation service including information about task amount
Translation	Language pair
Deadline	Deadline for task
Send e-mail	E-mail address of translation agency for receiving a translated document
Link to document	Link in web browser for downloading the document
Order submitted by	Translation agency manager that has issued and sent the PO to vendor
Order accepted by	Vendor name

Below you can see the sample of PO document.

www.kiev-bridge.com.ua
+38 (044) 587-92-16
+38 (044) 287-11-63

01033, Украина, г. Киев, ул. Саксаганского 39-Б, офис 3

Task

LLC , Reg. No. 40002154241
Rīga, Brīvības 81

Executor: Martin John

Date: 19.07.2017

Price: 80 USD for 4 pages

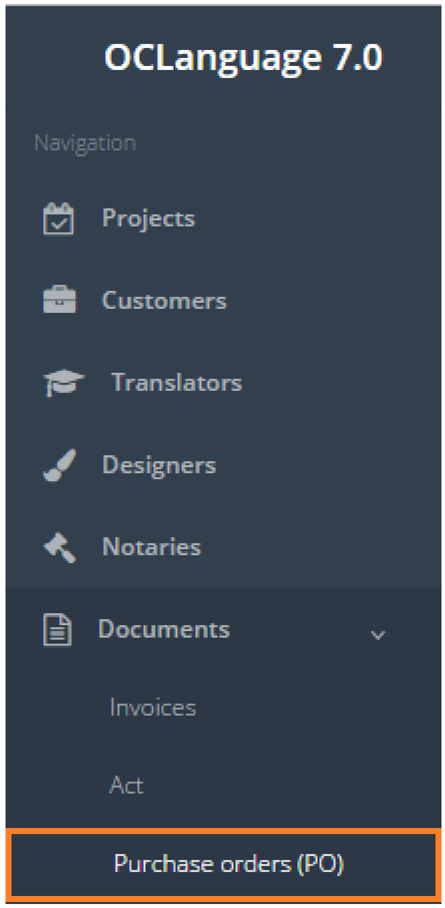
Notary approval	
From language	Into language
English	Hungarian

Deadline: 2017-07-20 2017-07-18
Send e-mail:

All information that is provided by the company LLC is highly confidential during the process of the translation and after completion of the project.

Order submitted by: Karlis
Order accepted by: Martin John

To manage a Purchase orders list, browse "Documents -> Purchase orders (PO)".

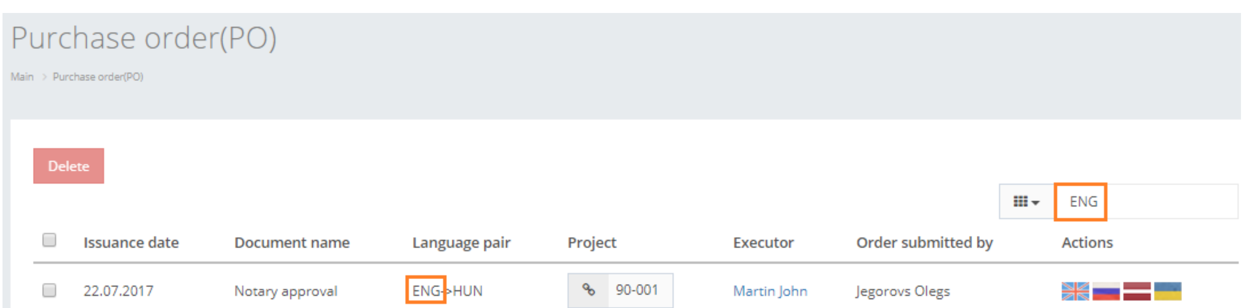


Purchase orders are revealed in the following system sections:

- Projects

User can filter data in PO database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter"



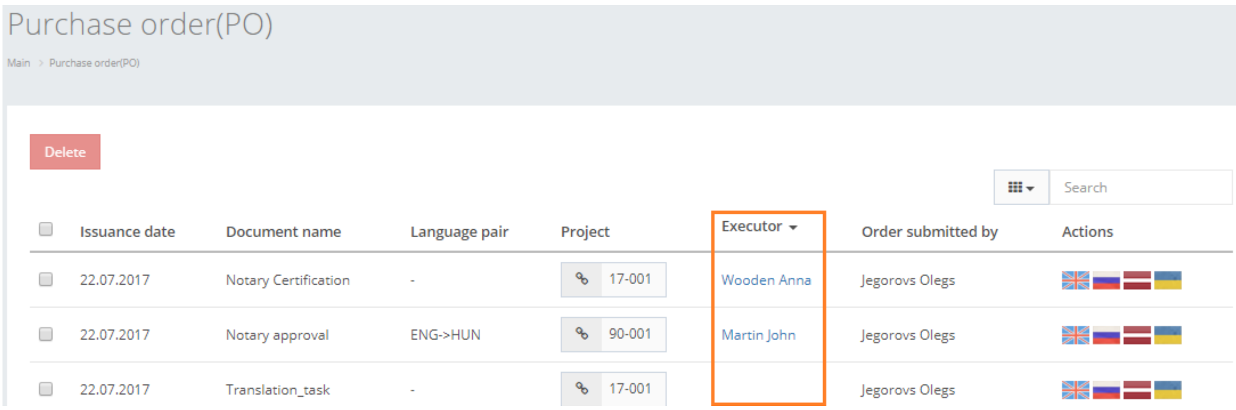
Below you will see a list of parameters (column names) the system searches data for:

- Issuance date
- Document name

- Language
- Project #
- Executor (vendor)
- Order submitted by (manager).

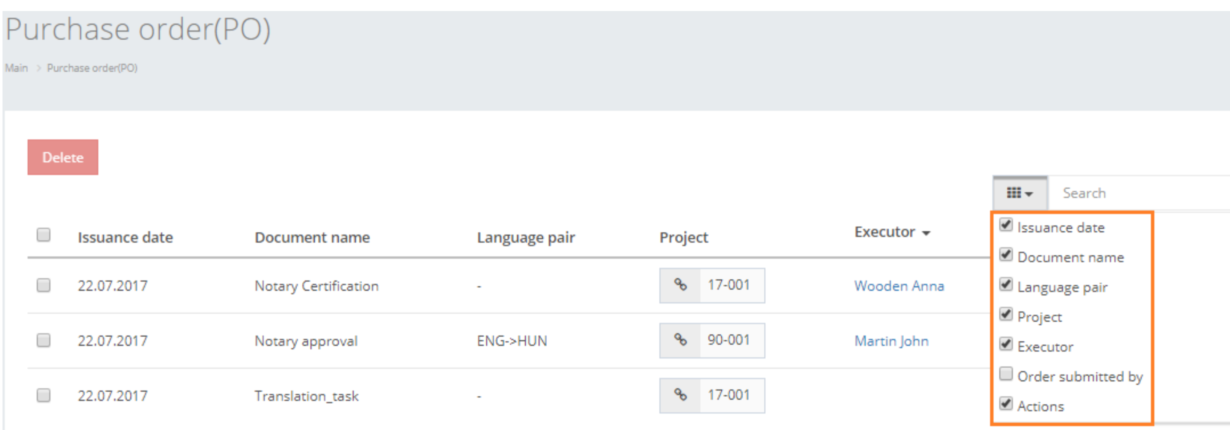
! Please note that data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the PO table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the PO database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

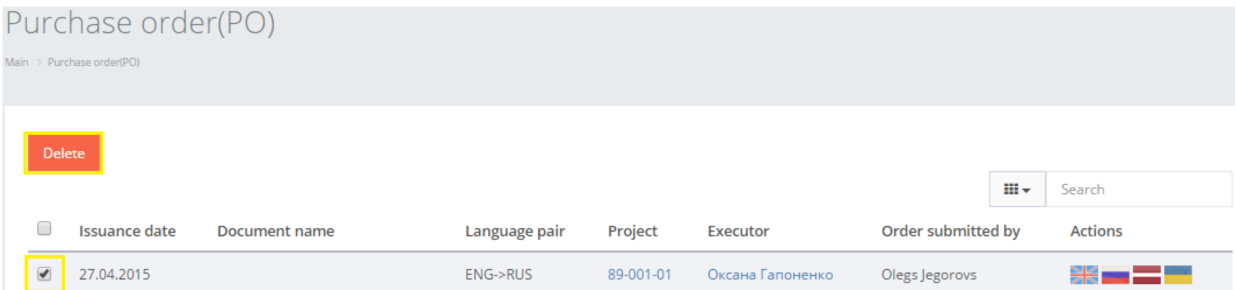


The table below reveals the data of columns from Purchase orders section.

Column name	**Description**
Issuance date	Invoice issuance date
Document name	Translation document name (saved in project document data window)
Language pair	Language pair names

Project	Project number (autonomically assigned by the system)
Executor	Vendor name
Order submitted by	Manager name
Actions	By clicking on flag icon, the system opens a Purchase order document in .pdf format

In order to remove a particular Purchase order, check the box next to the purchase order(s) that you want to delete and click "Delete".



5.3. Acts of Acceptance

OCLanguage represents a tool for autonomic creation of Act of Acceptance document.

This section includes all acts that have been created in the project window.

To see how to create a new Act of Acceptance document see user manual "7.9. How to issue Act of acceptance document".

To see how to send an Act of Acceptance to the Customer, see user manual "7.10. How to send Act to Customer".

Act of Acceptance is adjusted to translation agency template. The table below reveals the data that is included in the Act.

Data	**Description**
Logotype and company details	Set up during implementation process
Act of Acceptance	General document No. (to which this task belongs) from project details
Service name	Project task name
Unit	Unit of measure
Quantity	Amount
Price	Price per unit
Total	Total price
Without VAT	Amount on which VAT is not chargeable
Contractor	Translation agency data
Customer	Customer data

Text in the Act is subject to changes conducted in the program code which are made up upon request by translation agency.

Below you can see the sample of Act of Acceptance document.

www.kiev-bridge.com.ua
+38 (044) 587-92-16
+38 (044) 287-11-63

01033, Ukraine, Kiev, Saksaganskogo Street 39-B, office 3

Act of Acceptance #12D
Of supplied services (performed tasks)
at 17.06.2017

Private enterprise «Translation agency Bridge» on behalf of Director, Maxim Lobachevskiy, (hereinafter "Contractor") from one side and SIA OCL (hereinafter referred to as "Customer"), represented by ____, from other side, agree on this Act, that Contractor supplied Customer with following services (tasks performed):

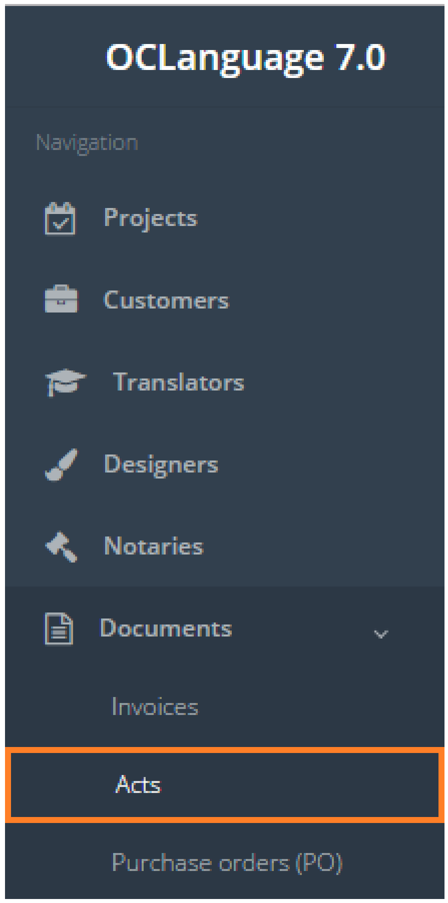
#	Service name	Unit	Quantity	Price	Total
1	Translation	Hour	4.00	23.00	92.00
				Total:	**92.00**
				Without VAT:	**-**
				In total:	**92.00**

Total quantity of services 1, for total price: 92.00 USD without VAT

By signing this Act, both parties confirm that they have fully met their obligations and do not have any claims to each other (including property, financial or other). The act is made in two copies, one for each party.

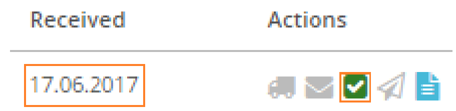
CONTRACTOR:	CUSTOMER:
Private enterprise "Translation agency Bridge" Chamber of Commerce A01 #372328 at 15.02.2011. Company Registration # 37481035, Bank account: 26001901349162 (OTP Bank), Kiev, MFI 300528 Address: Kiev, 01033, Saksaganskogo Street 39-B, office 5	SIA OCL
_________________________ Lobachevskiy M. Stamp	_________________________ Stamp

To view the Acts, browse “Documents” -> “Acts” in the main menu.



The table below reveals the data of columns from Acts database.

Column name	**Description**
№	Act number
Issue date	Issue date of document
Language pair	Language pair (from – into)
Project	Project number (assigned autonomically by system) and link to it
Total	Total amount in the act
Customer	Customer name
Sent	Sent by courier ( ) or e-mail ( ) (if the user clicks courier icon under Actions, the system autonomically marks the act as transferred). After clicking the icon, the system will reload the page, put date in “Sent” column and change icon color from grey to green. 

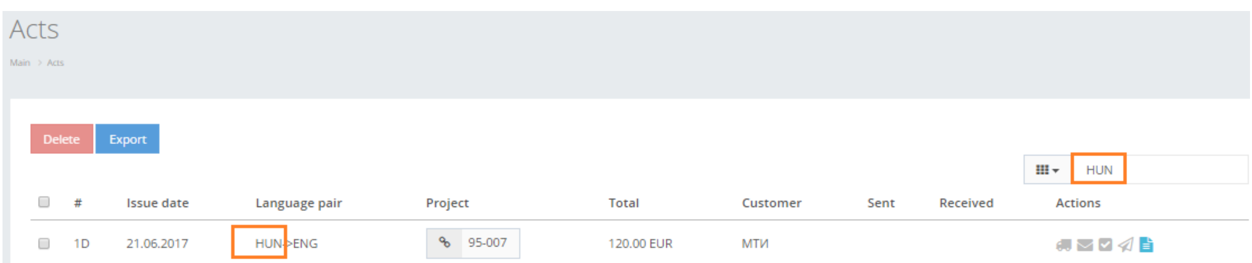
Received	Act is signed ( ): either received signed copy (if the user clicks Act received icon under Actions, the system autonomically marks the act as received) or the Customer signed Act in the office. After clicking the icon, the system will reload the page, put date in “Received” column and change icon color from grey to green. 
Actions	List of actions related to a particular invoice (the system reacts upon click on the icon)
Act sent by courier ( )	Click this option, if the act was sent to the Customer by courier
Act sent by postal service ( )	Click this option to send the act to the Customer’s address
Signed act is received ( )	Click this option to mark the act as received
Ask Customer to sign the act over e-mail ( )	Click this option to make the system send e-mail to the Customer in order to ask for signing the Act (the system uses the Customer’s e-mail for system documents)
View act ( )	Click this option to open the act in .pdf format

Acts are revealed in the following system sections:

- Projects

User can filter data in Acts database by using 3 methods:

4. Type letters or numbers in “Search” field and click “Enter”

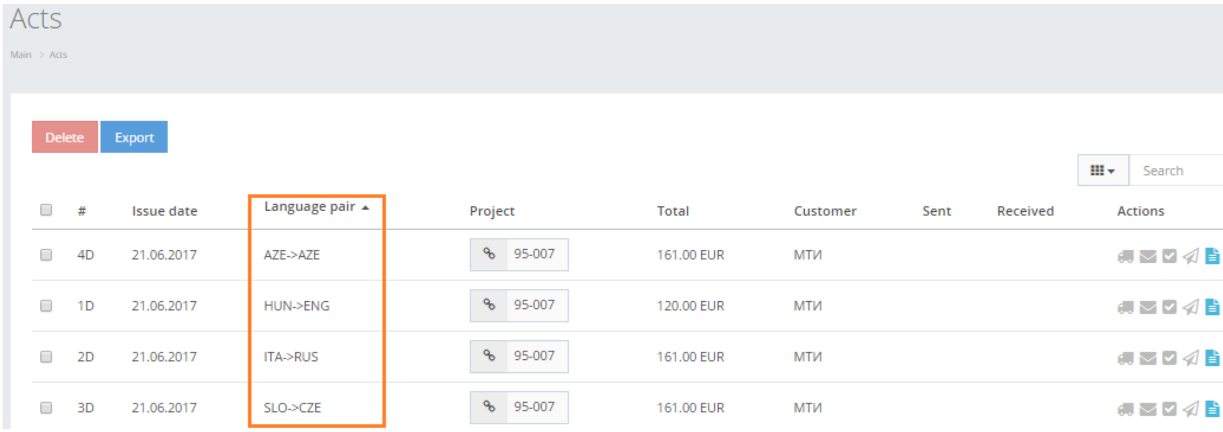


Below you will see a list of parameters (column names) the system searches data for:

- Issue date
- Language
- Project
- Total value of Act
- Customer.

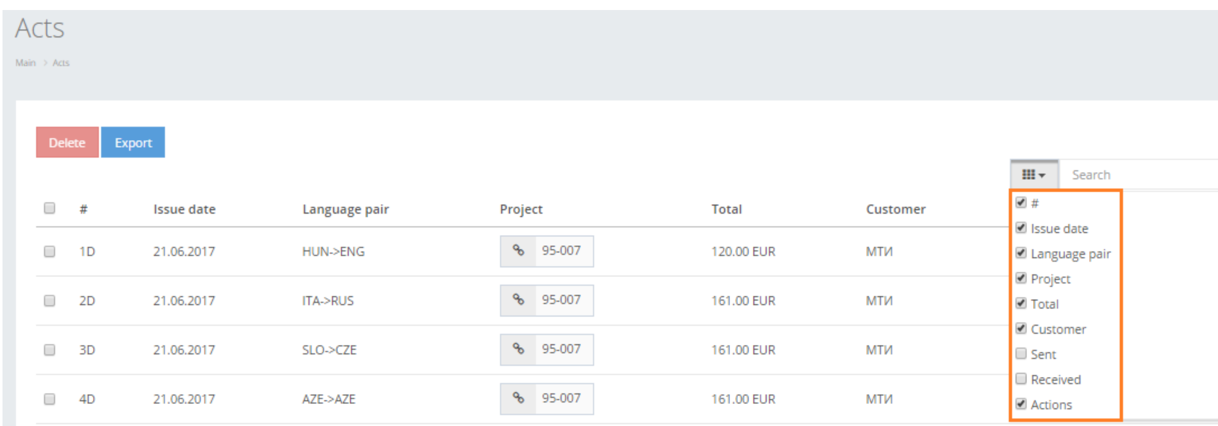
! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.

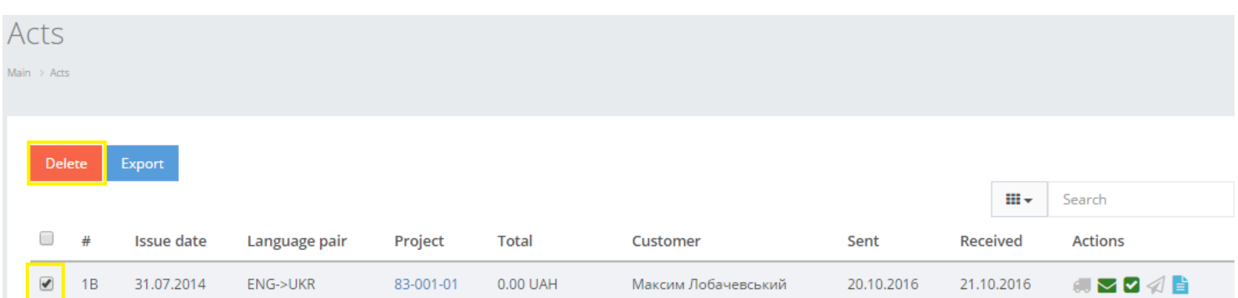


3. Review the columns that you want to see in the Acts table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Acts database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

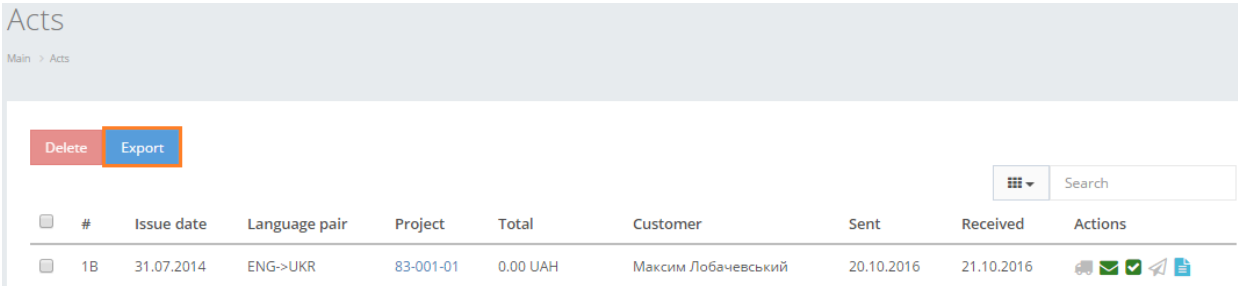
! Please note that the system will save these settings for upcoming user sessions.



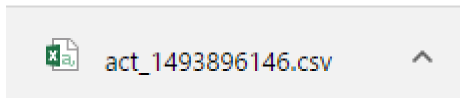
In order to delete a particular Act, check the box next to the act(s) that you want to delete and click Delete.

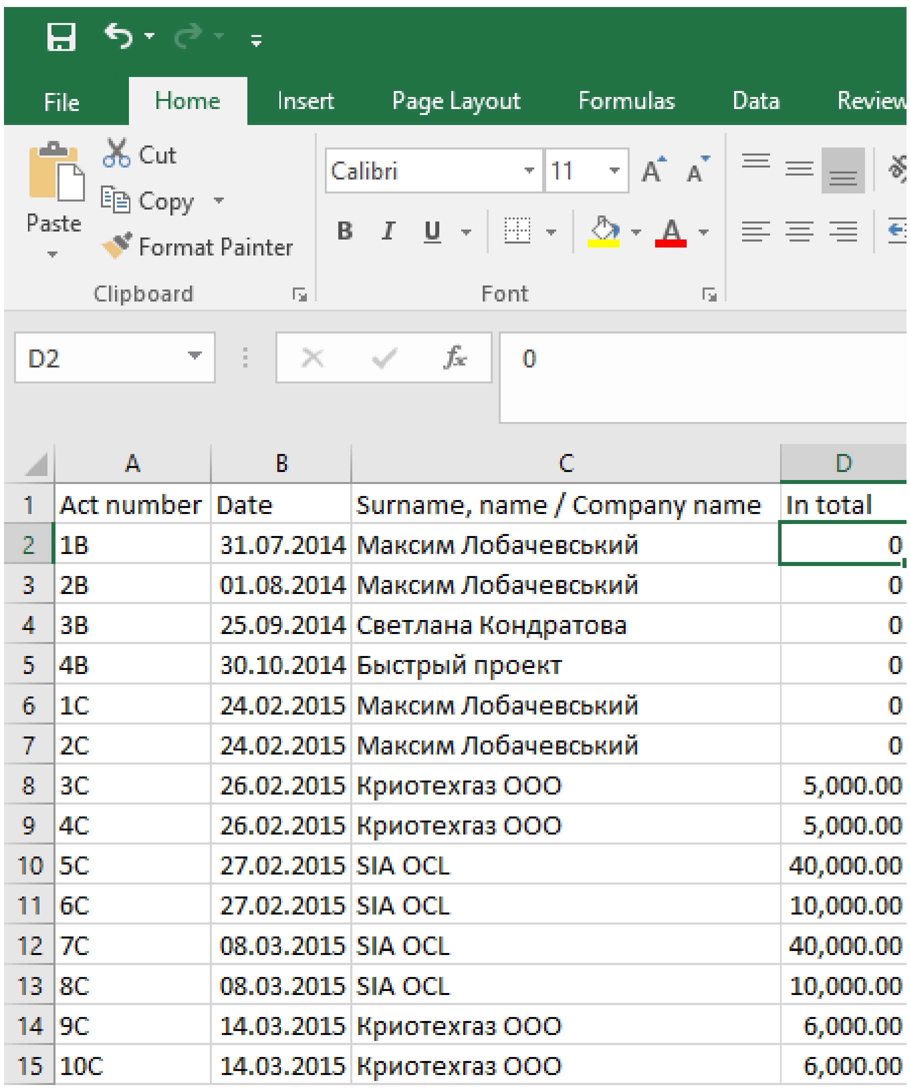


In order to export full table of acts click Export.



The system will autonomically generate a .csv file.





	A	B	C	D
1	Act number	Date	Surname, name / Company name	In total
2	1B	31.07.2014	Максим Лобачевський	0
3	2B	01.08.2014	Максим Лобачевський	0
4	3B	25.09.2014	Светлана Кондратова	0
5	4B	30.10.2014	Быстрый проект	0
6	1C	24.02.2015	Максим Лобачевський	0
7	2C	24.02.2015	Максим Лобачевський	0
8	3C	26.02.2015	Криотехгаз ООО	5,000.00
9	4C	26.02.2015	Криотехгаз ООО	5,000.00
10	5C	27.02.2015	SIA OCL	40,000.00
11	6C	27.02.2015	SIA OCL	10,000.00
12	7C	08.03.2015	SIA OCL	40,000.00
13	8C	08.03.2015	SIA OCL	10,000.00
14	9C	14.03.2015	Криотехгаз ООО	6,000.00
15	10C	14.03.2015	Криотехгаз ООО	6,000.00

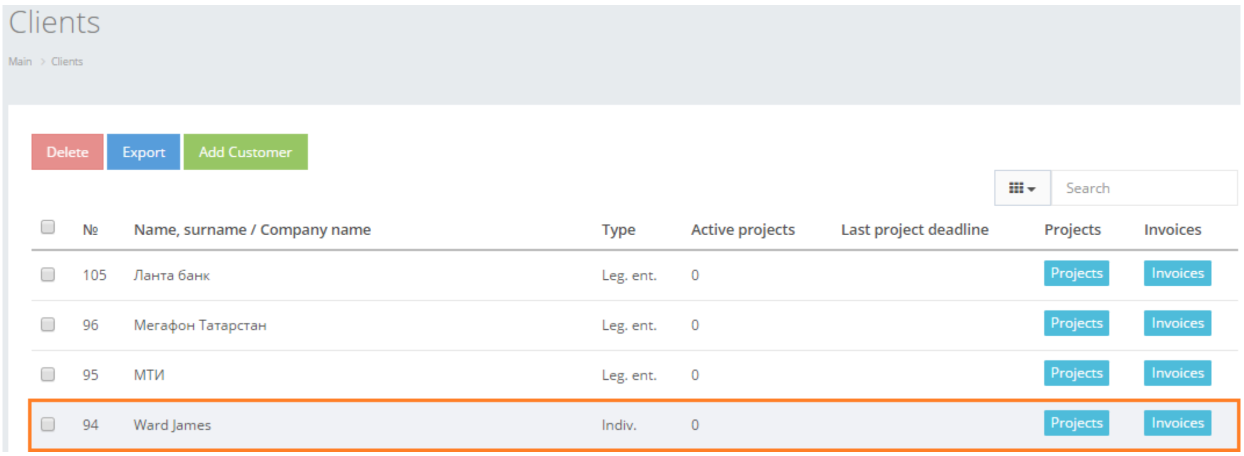
5.4. Agreements with Customers

OCLanguage represents a tool for autonomic creation of agreements with Customers. This document includes information about general agreement templates. You can see the appendices description under "5.5. Appendices to agreements".

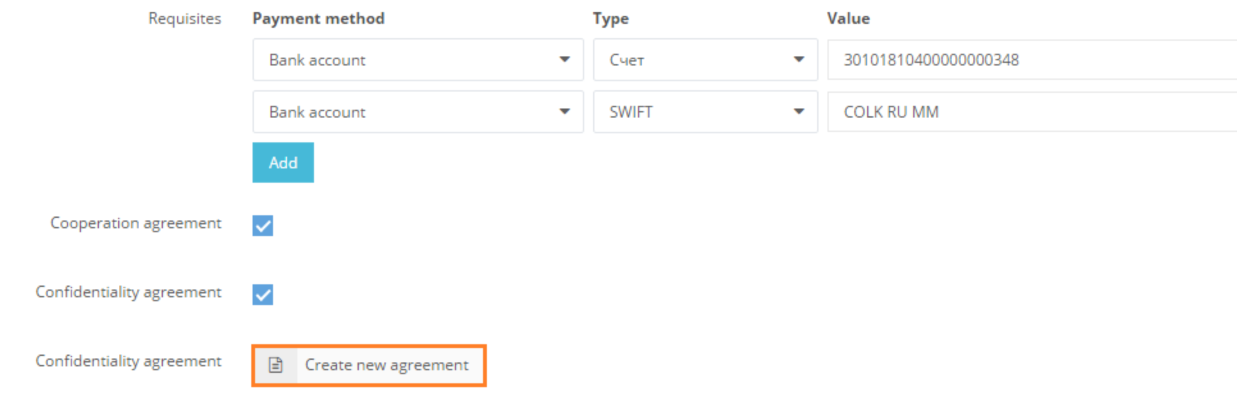
To open template for translation agency and Customer agreement take the following steps:

1. Create a new Customer (for detailed explanation see manual "6.1. How to create a new Customer")

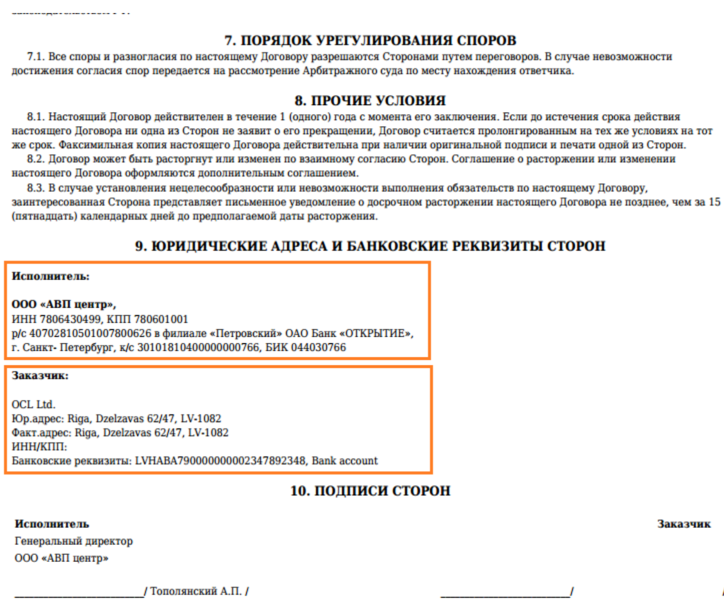
2. Open Customer data



3. Click “Create new agreement”. The system will reload the Customer’s page and supply the user with Agreement template.



4. The system will open an agreement template in new tab. Besides of main content of the agreement, at the end of it the system has included all supplier and Customer predefined details.



7. ПОРЯДОК УРЕГУЛИРОВАНИЯ СПОРОВ

7.1. Все споры и разногласия по настоящему Договору разрешаются Сторонами путем переговоров. В случае невозможности достижения согласия спор передается на рассмотрение Арбитражного суда по месту нахождения ответчика.

8. ПРОЧИЕ УСЛОВИЯ

8.1. Настоящий Договор действителен в течение 1 (одного) года с момента его заключения. Если до истечения срока действия настоящего Договора ни одна из Сторон не заявит о его прекращении, Договор считается пролонгированным на тех же условиях на тот же срок. Факсимильная копия настоящего Договора действительна при наличии оригинальной подписи и печати одной из Сторон.

8.2. Договор может быть расторгнут или изменен по взаимному согласию Сторон. Соглашение о расторжении или изменении настоящего Договора оформляются дополнительным соглашением.

8.3. В случае установления нецелесообразности или невозможности выполнения обязательств по настоящему Договору, заинтересованная Сторона представляет письменное уведомление о досрочном расторжении настоящего Договора не позднее, чем за 15 (пятнадцать) календарных дней до предполагаемой даты расторжения.

9. ЮРИДИЧЕСКИЕ АДРЕСА И БАНКОВСКИЕ РЕКВИЗИТЫ СТОРОН

Исполнитель:

ООО «АВП центр»,
ИНН 7806430499, КПП 780601001
р/с 40702810501007800626 в филиале «Петровский» ОАО Банк «ОТКРЫТИЕ»,
г. Санкт- Петербург, к/с 30101810400000000766, БИК 044030766

Заказчик:

OCL Ltd.
Юр.адрес: Riga, Dzelzavas 62/47, LV-1082
Факт.адрес: Riga, Dzelzavas 62/47, LV-1082
ИНН/КПП:
Банковские реквизиты: LVHABA7900000000002347892348, Bank account

10. ПОДПИСИ СТОРОН

Исполнитель
Генеральный директор
ООО «АВП центр»

______________/ Тополянский А.П. /

Заказчик

______________/ /

! Please note that main content is a subject to changes according to translation agency’s agreement template. This is processed during OCLanguage implementation stage.

5.5. Appendix to agreement

OCLanguage represents a tool for autonomic creation of appendices to general cooperation agreement with the Customer. This document includes information about particular project that the translation agency has supplied its services for. You can see the description of appendices creation in user manual “7.6. How to issue appendix to agreement”.

! Please note that Appendices are created for written translation projects only.

Appendices of agreement are not stored in separate section in the system.

Appendix is adjusted to translation agency template. The table below reveals the data that is included in appendix.

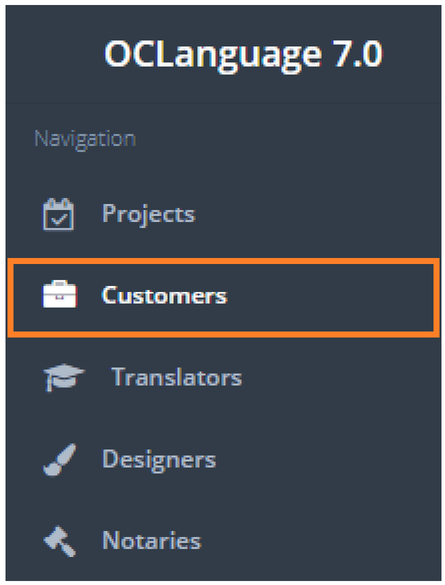
Data	**Description**
Order No.	Order Number is based on combination of unique Customer and Project number from this Customer
Customer	Customer name
Contact person	Contact person at Customer’s side
Customer manager	Responsible manager of this Customer
Coordinator of the order	Responsible manager of the order
Task deadline	Deadline for the Customer
Task type	For written translation the system has 5 predefined task types: • Translation (including sworn translator) • Translator services (selection, literary editing, validation, layout, proofreading) • DTP • Notary certification • Other task.
Language pair	Order language pair
Amount	Amount of task
Total price for Customer	Total price for written translation
Discounts and surcharges	All discounts and surcharges for written translation project
Preliminary price for whole project	Specified preliminary project price (on the 1st stage of project management, when the user saves general data)
Amount in words	Amount in words (the system will provide data autonomically)
The total price of order is counted, based on Acts of Acceptance	This text is adjusted to translation agency needs

6. Customers

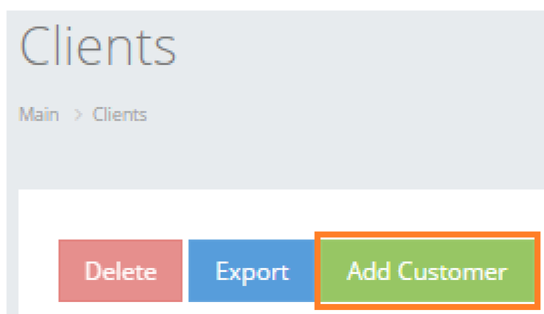
6.1. How to create a new Customer

In order to create a new Customer follow the below steps:

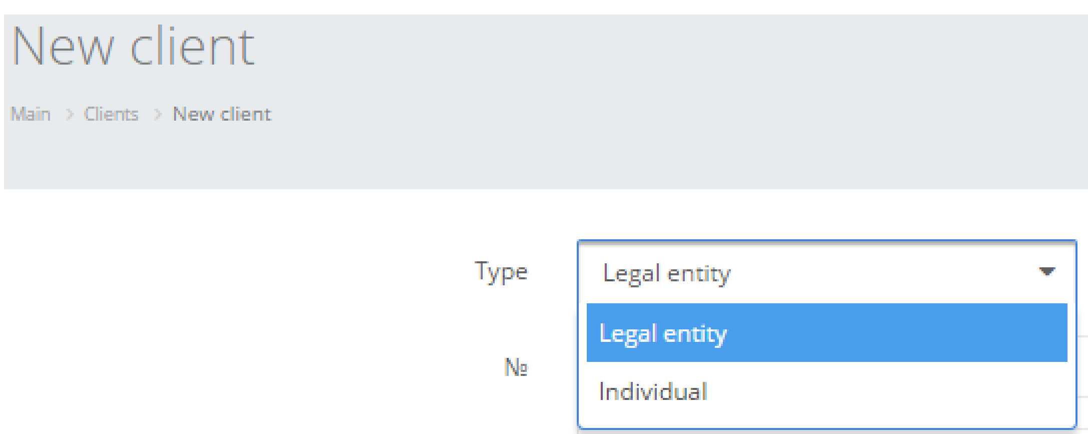
1. Browse "Customers" table



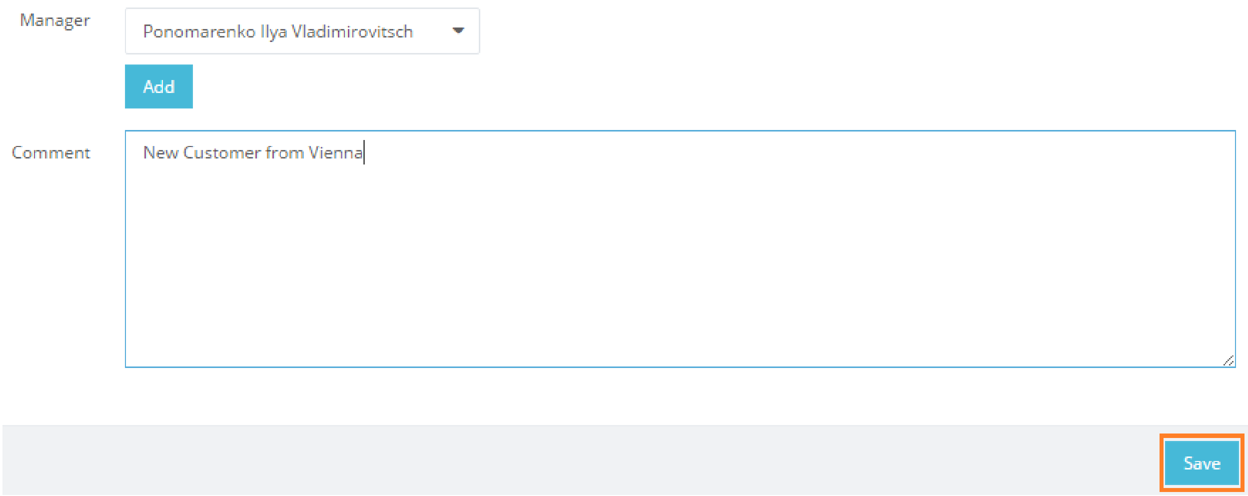
2. Click "Add Customer"



3. Register either a legal entity or an individual



4. Fill in the fields and click “Save”.



! The system will accept the registration of the new Customer only if all obligatory boxes are filled.

Fill in the following fields in order to register a legal entity:

Field	**Description**
No.	The system automatically generates a new Customer number (first available number in Customer stack)
Company name	Legal name of the company
Registration No.	Company Registration No.
VAT	Company VAT No.
Country	Country, where the company is registered/based
Actual address	Actual address of the company
Legal address	Legal address of the company
ZIP	Postal code
Contact info	Contact data of the Customer Let’s stress “E-mail for invoices” field – e-mail address the system will send all invoices to. Click “Add” to add more contact data.
Contact persons	Contact persons at Customer’s side Click “Add” to add more contact persons.
Requisites	Company requisites

Cooperation agreement	Mark if a cooperation agreement between the translation agency and it's Customer is signed
Confidentiality agreement	Mark if a confidentiality agreement between the translation agency and it's Customer is signed
Invoice due dates	Allowance for credited payment
Discounts	Discount amount for projects (%)
Branch	Branch where the Customer is served
Manager	Responsible manager of this Customer Click "Add" to add one more account manager
Comment	Field for making notes about the Customer

Fill in following fields in order to register an individual:

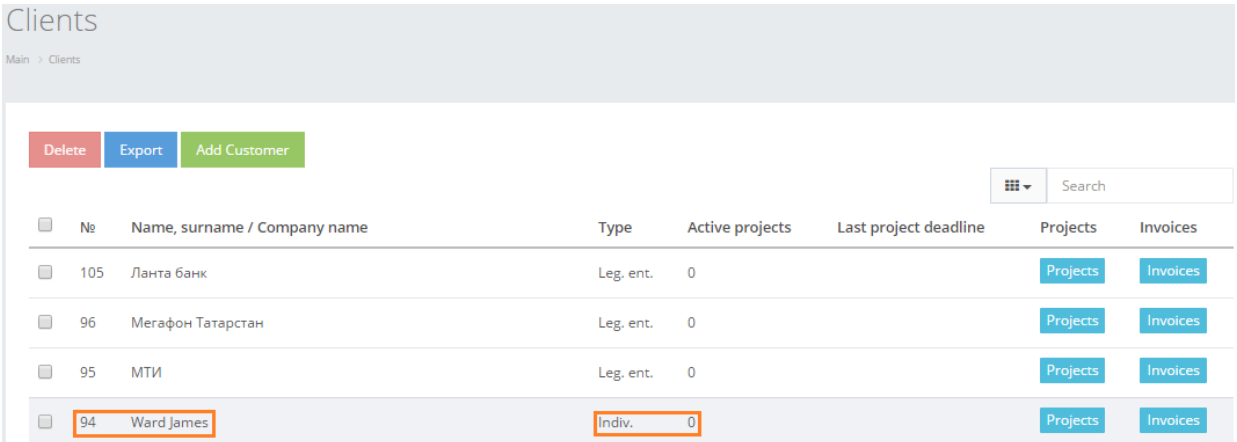
Field	**Description**
No.	The system automatically generates a new Customer number (first available number in Customer stack)
Name	Person's name
Surname	Person's surname
Gender	Person's gender
Personal code	Individual tax payer number
Date of birth	Person's birthday
Personal data	Person's passport number
Country	Customer's residence country
Actual address	Actual address of the person
ZIP	Postal code
Contact info	Contact data of the Customer Let's stress "E-mail for invoices" field – e-mail address the system will send all invoices to. Click "Add" to add more contact data.
Contact persons	Contact persons at Customer's side Click "Add" to add more contact persons.

Requisites	Individual’s requisites
Cooperation agreement	Mark if a cooperation agreement between the translation agency and it’s Customer is signed
Confidentiality agreement	Mark if a confidentiality agreement between the translation agency and it’s Customer is signed
Invoice due dates	Allowance for credited payment
Discounts	Discount amount for projects (%)
Branch	Translation agency’s branch, where this Customer places orders
Manager	Responsible manager of this Customer Click “Add” to add one more account manager
Notes	Field for notes on the Customer

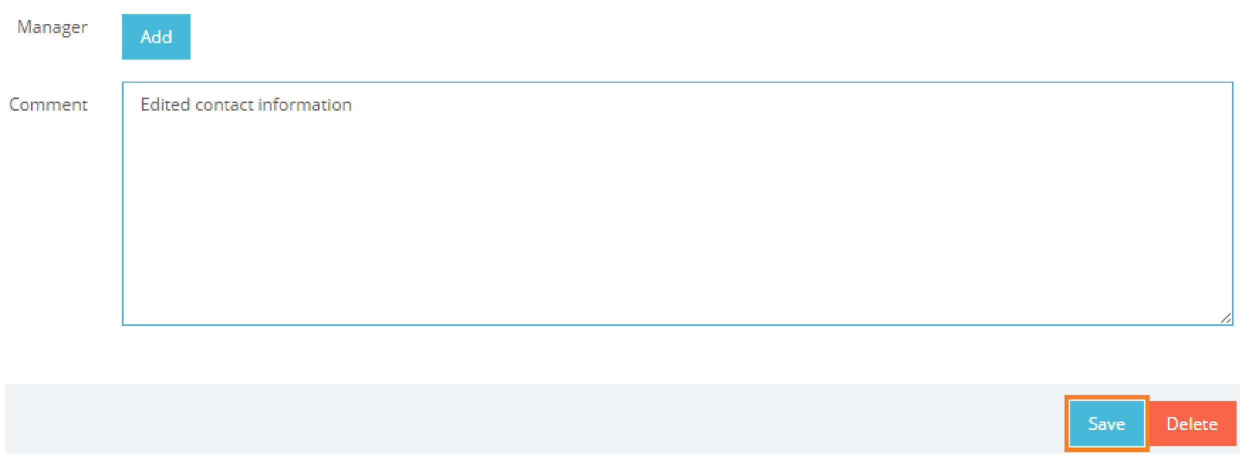
6.2. How to edit or delete Customer’s data

In order to open the Customers table click “Customers” in the navigation pane and take the following steps:

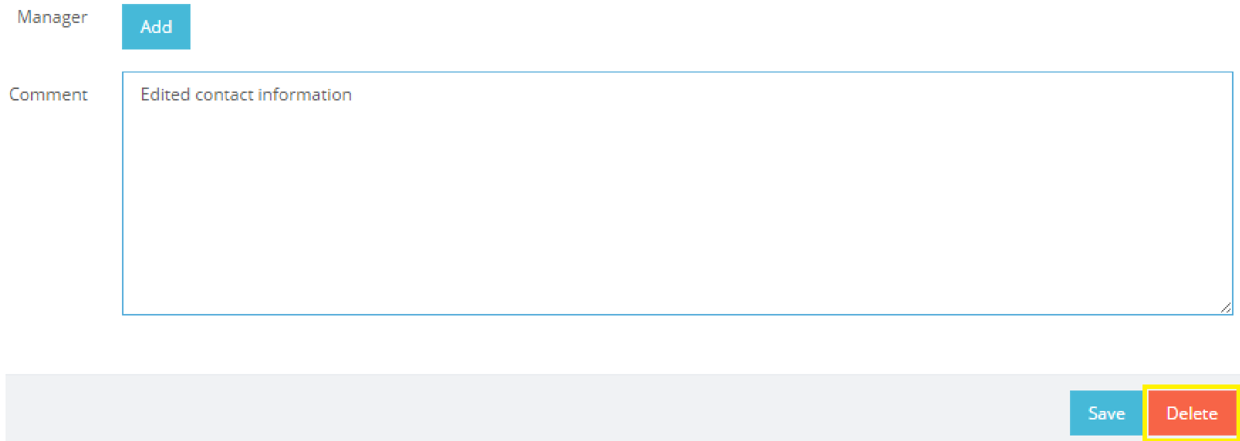
1. In the table the user can see all Customers. Click the one you would like to edit or delete (click on the text).



2. The system will open “Main information” window, where the user can see some of the main data about the Customer. Edit the information in fields and click “Save”.



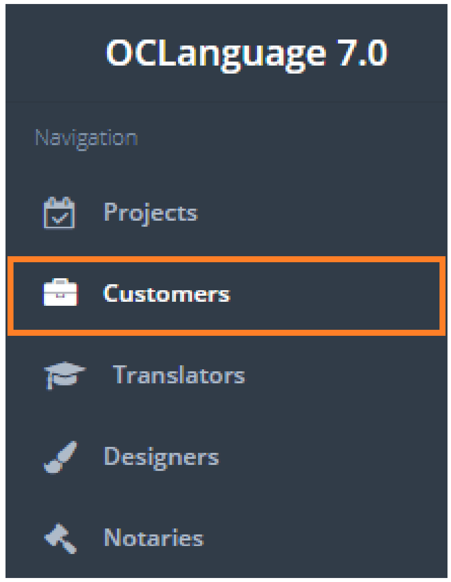
If you would like to remove the Customer's record, click "Delete".



! Please remember that Customer's deletion will not incur project related data deletion. It means that any projects that were created under this Customer before the deletion will be stored in the system.

6.3. Customers table

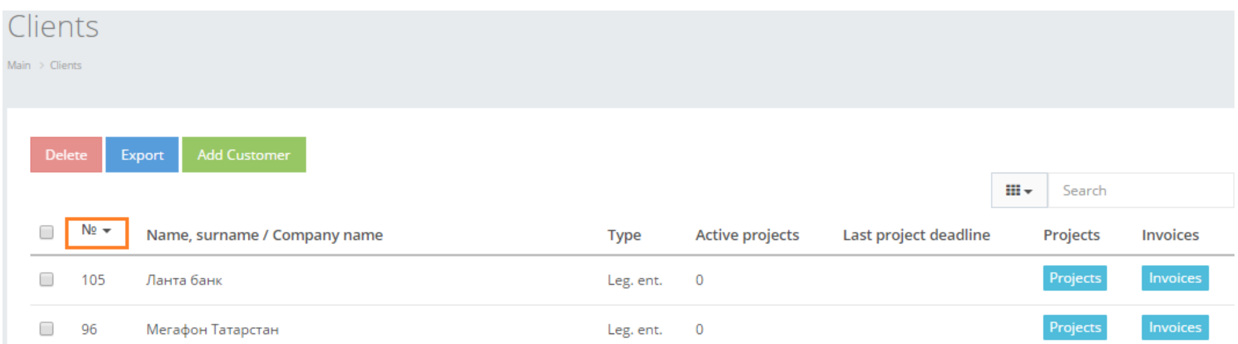
In order to open the Customers table click "Customers" in the navigation pane.



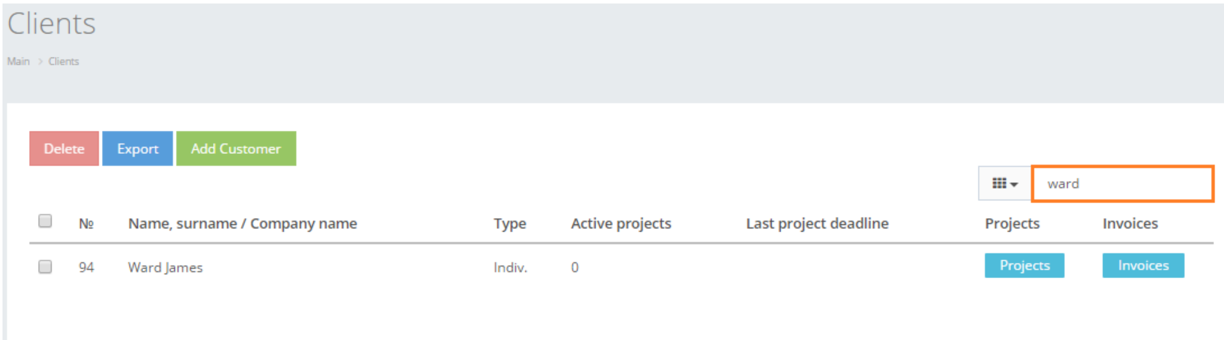
User can sort Customers data using three methods:

- Filtering data by column
- Quick Search
- Sorting needed columns.

User can filter the table while clicking the column names. The system will automatically sort the records according to the filter specified.



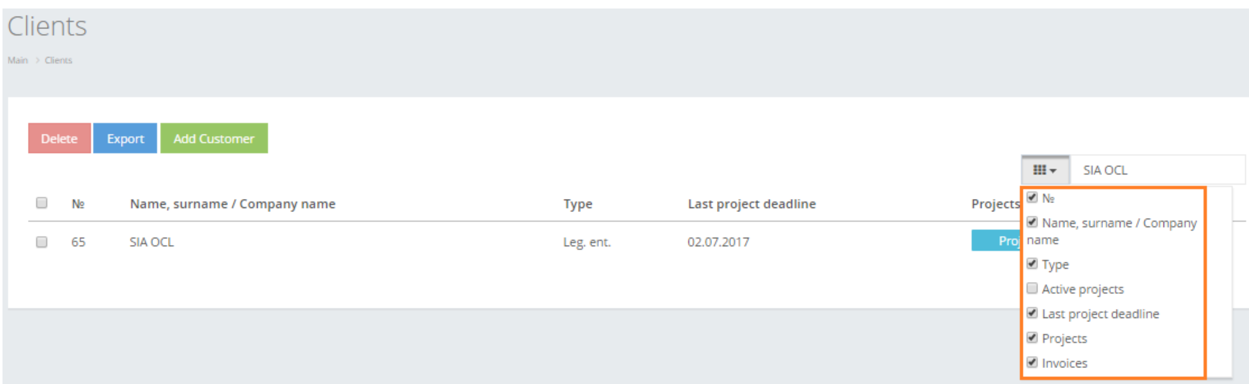
In order to use Quick search option just type in the symbols, words or numbers, click Enter and the system will supply the user with appropriate records. The system will search according to the Customer name only.



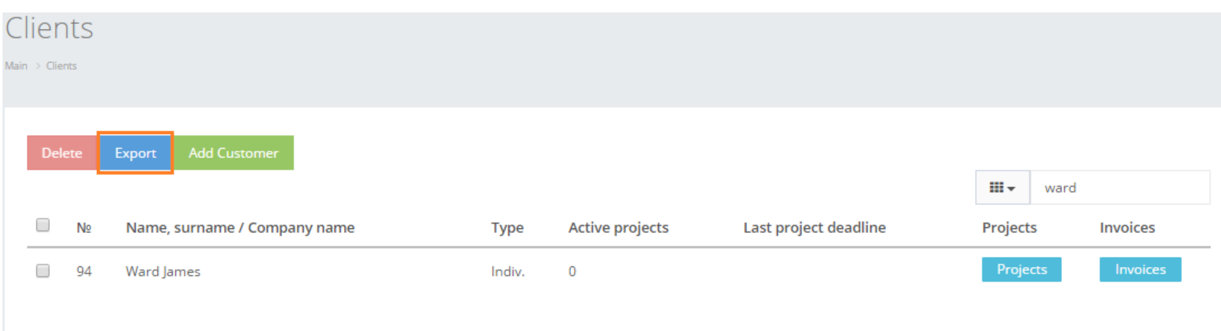
! Please note that Quick search is relevant only for searching data from the Customers' page currently opened. For example, if the user has opened the 1st page of the table and tries to search for data stored in the 5th page, the system will NOT bring up any data.

Review the columns that you want to see in the Translation domains table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Domains database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



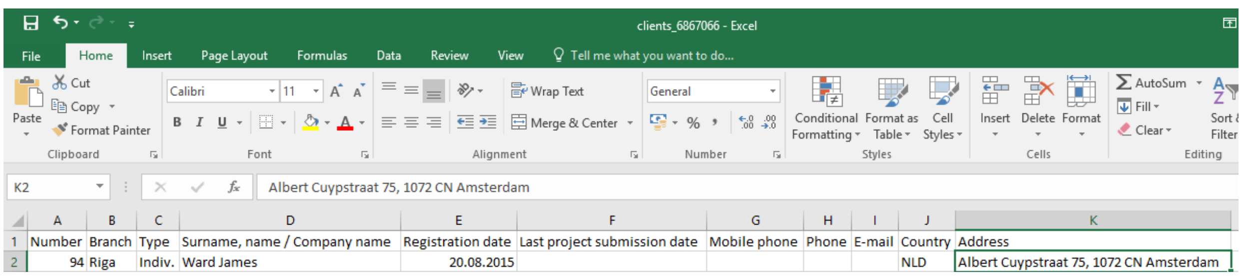
Click "Export" to export data to Microsoft Excel.



Upon request the system will serve the user with an .xls file that consists of the following data.

Excel Column name	Description
Number	Customer unique ID

Branch	Translation agency's branch name, i. e. the office, which handles orders from a particular Customer
Type	Customer type (choose between Individual and Legal entity)
Surname, name / company name	Customer initials
Registration date	Date, when the Customer account was created
Last project submission date	Date, when the last project was submitted to the Customer
Mobile phone	Customer's mobile phone number
Phone	Customer's phone number
E-mail	Customer's e-mail address
Country	Country of residence
Address	Customer's address



The Customers table is very flexible in terms of tailoring the selected data according to translation agency needs. Any column can be removed or edited up to translation agency request to developers of OCLanguage.

The Customers table consists of the following columns.

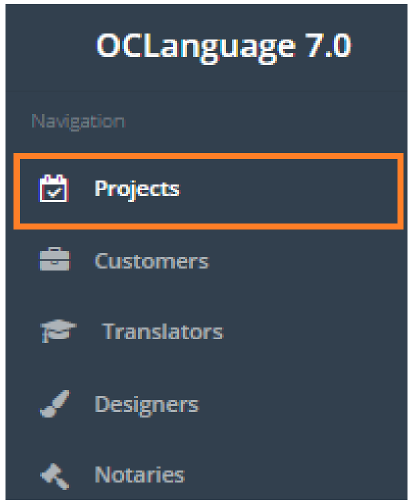
Column name	**Description**
No.	Customer number in stack, issued by the system
Name, surname / company name	Customer initials
Type	Customer type – Individual or Legal entity
Active projects	Quantity of active projects. A project is considered as active, if the project status is "In progress" (Proejct overview window).
Last project deadline	The system shows a deadline of last project for result file submission to the Customer
Projects	Link to Customer's projects
Invoices	Link to Customer's invoices

7. Project management

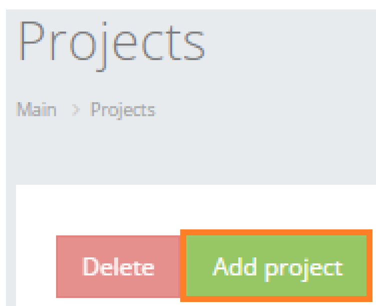
7.1. How to add a new written translation project

To create a new written translation, go through the following steps:

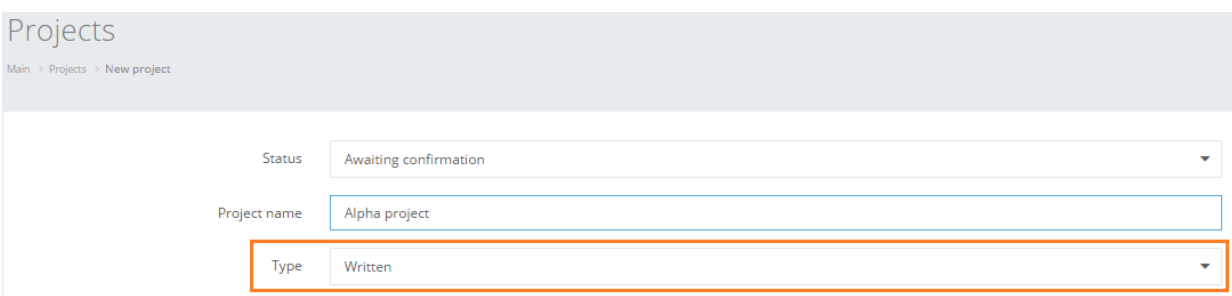
1. Under the main menu click "Projects".



2. Click "Add project".



2. Choose "Written" project type and fill other fields.

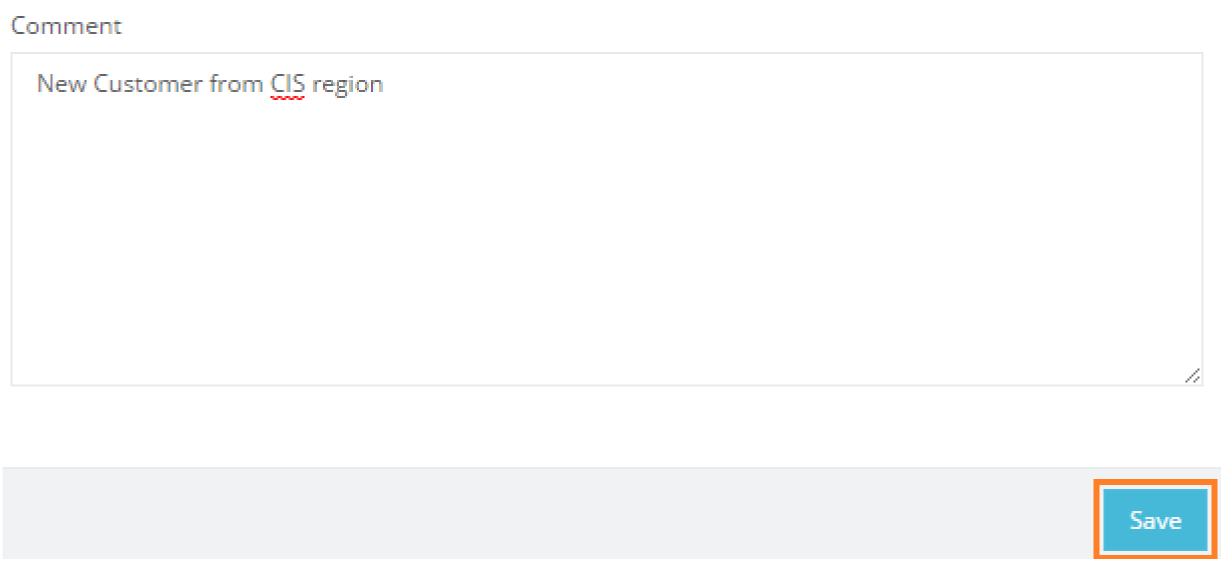


Field	Description
Project #	Unique project number in projects database
Status	Project can be in one of the below stated statuses: • Awaiting confirmation

	• In progress • Issued invoice • Paid • Cancelled • Delivered • Evaluating • Finished • Achieved. ! All project statuses are set up manually. None of them are changed automatically. Which means the user should maintain a correct project status by himself.
Project name	Specify project name
Type	Oral/written translation project
Deadline	General deadline of project submission to the Customer
Order confirmed by Customer	Check the box, if the Customer has confirmed his order of particular project
Meets Customer requirements	Check the box to approve the statement above. Relevant, if the Customer sets up specific requirements that have to be met
Call, when order is ready	Check the box, if a call is needed upon submission of the final version of document
Customer	Specify the Customer's name
Manager	Specify translation agency's manager name
Notes, requests	Any specific notes or requests from the Customer's side like the ones below: • Columns • Print • Apostille • High quality • Track changes.
Submission method	Specify which submission method is expected from the Customer's side: • E-mail • Fax • In office • Courier • CD/DVD • By post • In the notary's office.
Budget	Estimated total project budget
Advance payment	The amount of advance payment to be made before the order execution
Discount (%)	The amount of discount in percentage

	! Please note that OCLanguage permits to set a discount and assign it to the Customer, Customer's project and task, belonging to the project. See more information in document "7.11. Discount management"
Payment method	Specify the payment method. Check the box, if any of payment methods are relevant to the project: • Cash • Receipt • Invoice • Free of charge.
Documents left in office	The amount and notes about translation related documents (originals, translated copies, notary-approved copies etc)
Comment	Make notes of the project

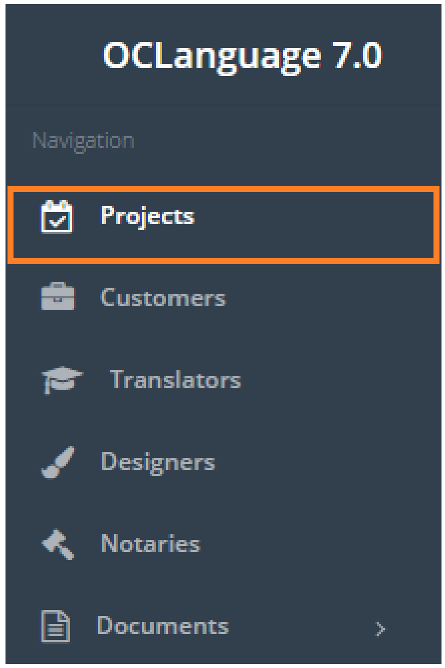
3. Click "Save" to finish the creation of a new written translation project.



Once the user has saved the project, the system automatically opens a general management window with options of adding new tasks for translation, issuing invoices, acts and POs.

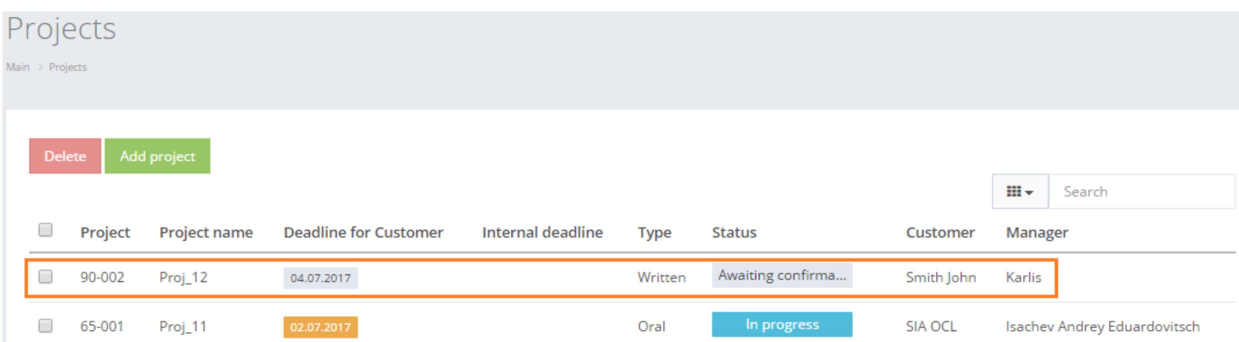
7.2. Management of existing project

To open the project data click “Projects” in the main menu.

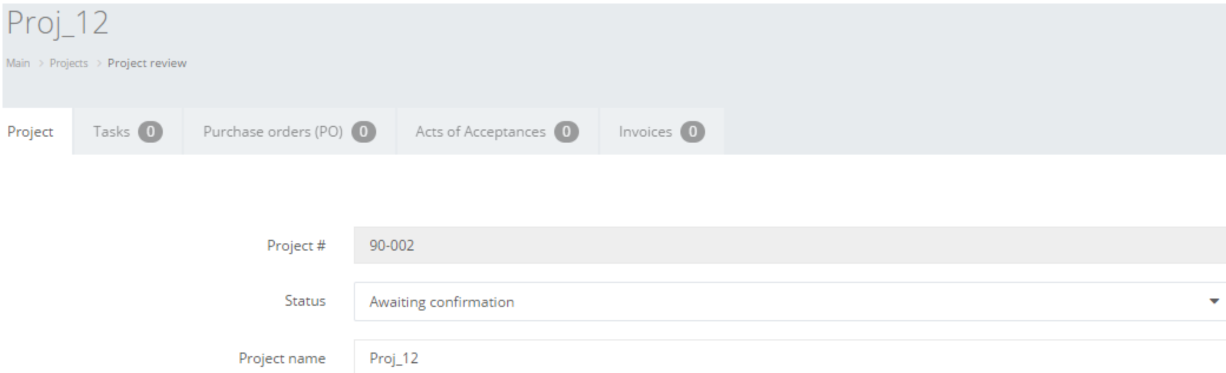


To study scrutinized description of project table browse for user manual “7.18. Project table”.

To open a management window of particular project, click the particular record.



General project management window supplies the user with options of adding new tasks for translation, issuing invoices, acts, POs and appendices.



To see how to issue the Act of Acceptance document for Customers, browse documentation “7.9. How to issue Act of acceptance document”.

To see how to issue an Appendix to Agreement, browse user manual “7.6. How to issue appendix to agreement”. This document is generated automatically and is supposed to be used for documenting the legal terms of project.

To see how to issue a PO (Purchase order) document, browse user manual “7.14. How to issue PO document for vendor”. PO document stands for purchase of services order from vendor.

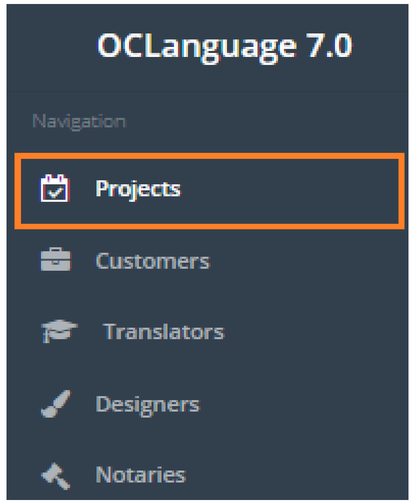
To see how to issue an invoice to the Customer, browse user manual “7.7. How to issue invoice for project”.

To see how to issue an agreement of cooperation between the Translation agency and the Customer, browse user manual “5.4. Agreements with Customers”.

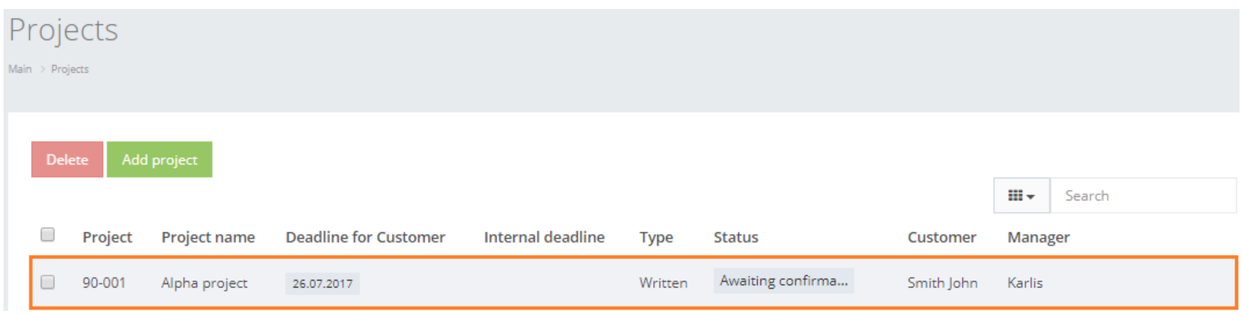
7.3. How to add task

Take the following steps in order to add a task:

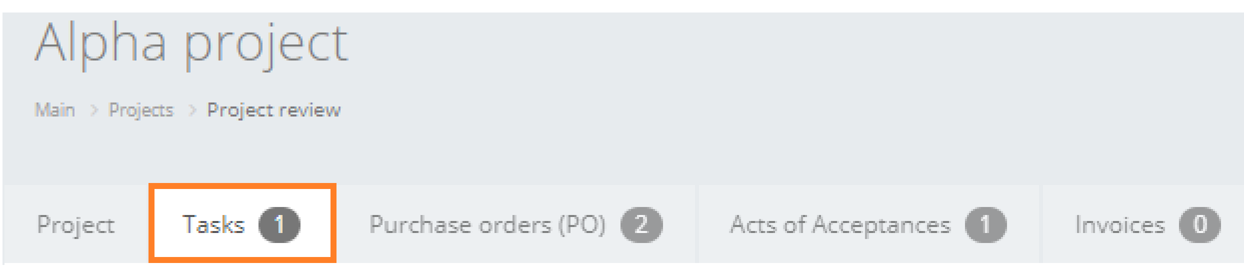
1. Open the project data and click “Projects” in the main menu.



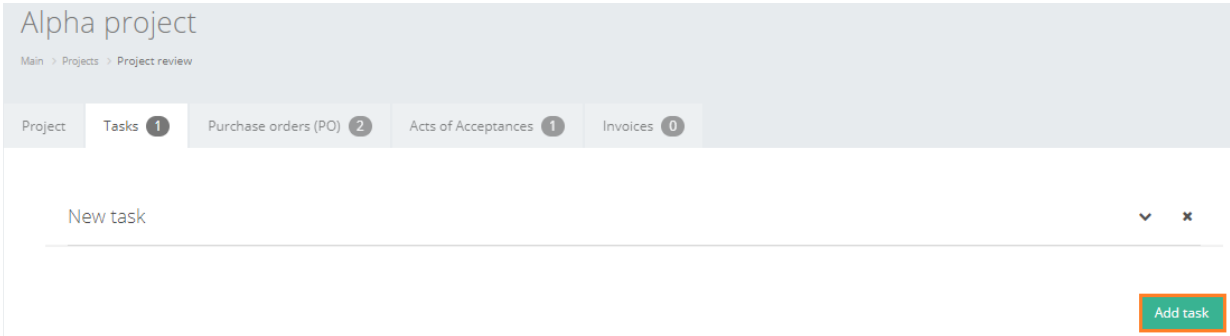
2. Click a particular project.



3. Click tab “Tasks” to open Task window.



4. Click “Add task”.



5. Fill in the task data.

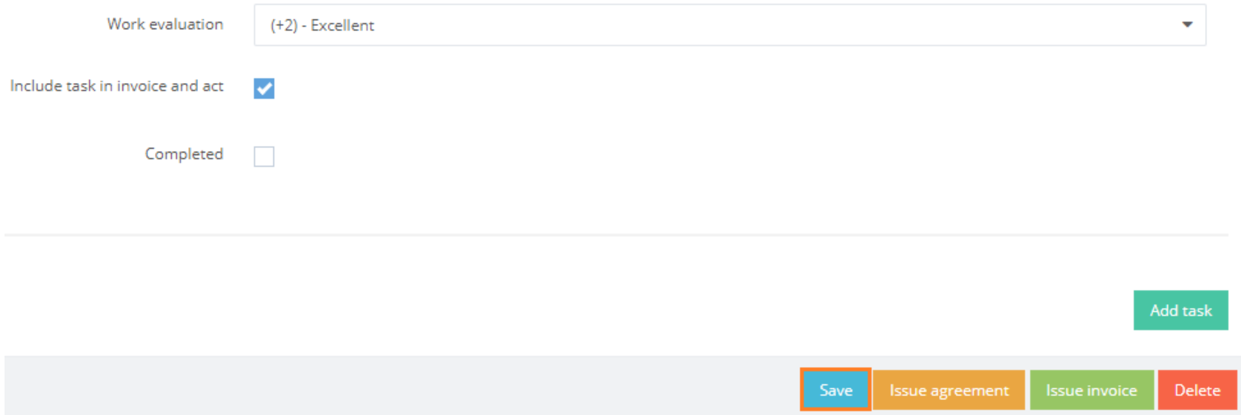
Document task has the following data that the user has to provide.

Field	Description
Task name	Specify task name. ! Please note that the task name is revealed in invoices for Customers and PO documents for vendors.
Task type	Specify task type: • Translation • Translator service (selection, literary editing, validation, layout, proofreading) – if translator service is selected, then the system allows to choose original language only • DTP • Notary certification • Sworn translator • Other task. ! Please note that according to the task type specified the system automatically supplies the user with available vendors. See more information in user manual "7.4. Task type".
From language	Specify from which language the translation will be performed
Into language	Specify into which language the translation will be performed
Translation type	Specify translation type – choose either from options: • Technical • Legal • Economics • Medicine

	• Customs • Science • Personal.
Vendor	List of vendors, which are able to handle the above specified task ! In case of translators the system will bring up only those vendors, whose availability status is positive.
Urgency	Specify if the task is urgent or not (choose between 2 options: regular or urgent).
Deadline for Customer	Specify deadline of task for the Customer
Deadline for vendor	Specify deadline of task for the vendor ! Please note that the user is able to set up 2 deadlines: for project and task. If the user has set up a deadline for the whole project, then it always reminds about general deadline, when the user is about to create a new task or document.
Amount for Customer	Specify amount of task for the Customer (units of measure – characters, words, pages, documents)
Use this amount in invoice	Check this box, if you plan to show the total amount (for example, 4 pages for price 5$/page with total amount of 20$) in the invoice for the Customer
Amount for vendor	Specify amount of task for the vendor (units of measure – characters, words, pages, documents)
Budget of task per Customer – price	Click to select price list (price list creation and management is described in user manual “7.5. How to add new pricelist”)
Price	If the user has chosen a price list, the system will autonomically reveal the total price for the Customer (multiplication of Total amount and price for unit of measure).
Project budget	Total budget of project
No discount available for this item	Check the box, if you don’t want to grant discount for a particular task.
Payment to vendor – price	The system autonomically reveals the price for vendor service per unit of measure.

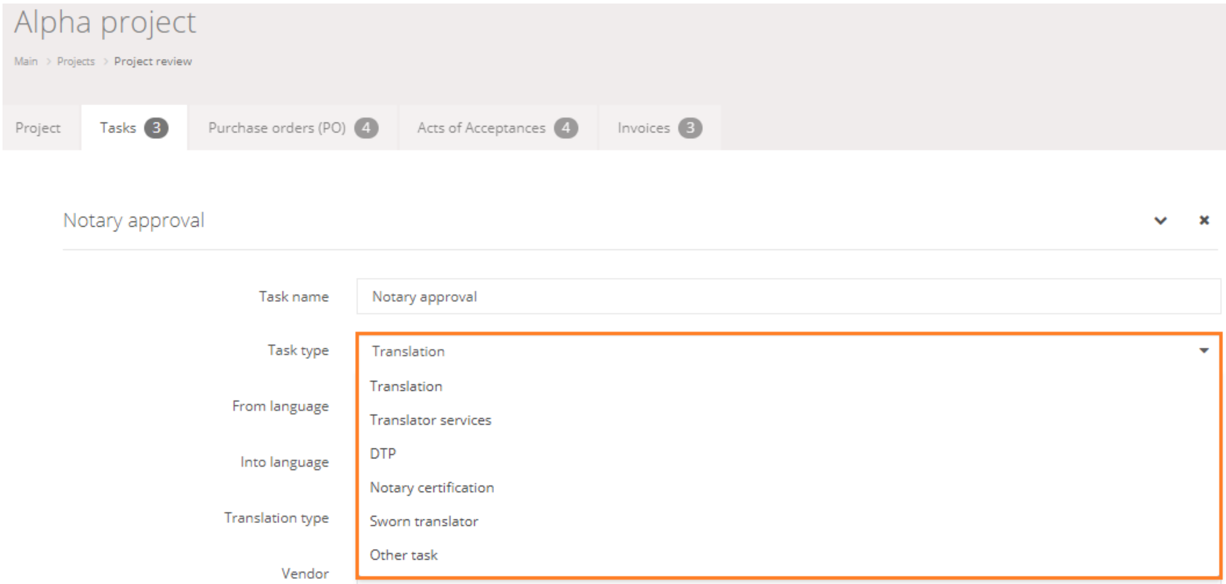
Price	System autonomically calculates the total amount for vendor (multiplication of Total amount and price for vendor service per unit of measure). The user is always able to revise the honorarium amount.
Full amount paid to vendor	Check the box, if the translation agency has processed full amount of honorarium (this parameter is maintained manually).
Translator’s approval	Check the box, if a translator approved, that he would handle a particular task.
Working materials	Upload working materials that are used to prepare the required task. Drag and drop files to upload them into OCLanguage. Alternative option is to click on the field and find a needed file via local computer directories.
Documents for Customer	Upload a result file that is submitted to the Customer. Drag and drop files to upload them into OCLanguage. Alternative option is to click on the field and find a needed file via local computer directories.
Technical requirements	Specify technical requirements related to the task.
Information for vendor	Specify information for the vendor related to the task. ! Please note that this field is for translation agency’s internal use only. The information is NOT included in Purchase Order (PO) document.
Comment	Provide additional comments, if needed.
Work evaluation	Provide a mark to the vendor from –2 to +2 to evaluate quality of the performed task.
Include task in invoice and act	Check the box, if you want to include this task in the invoice and Act of acceptance. Once these changes are saved, the system will automatically include it into the invoice. Every task equals to a line in the invoice.
Completed	Check the box, if the task was fully completed.

6. Click “Save”.


Work evaluation
(+2) - Excellent
Include task in invoice and act
Completed
Add task
Save
Issue agreement
Issue invoice
Delete

7.4. Task type

Based on task type the system supplies the user with relevant task executors or vendors.



Below you will find the description of every task type:

1. Translation – the system automatically brings up all translators, which comply with the following requirements:

- Language pair stipulated in relevant Document data is the same as the particular translator is able to provide. In other words, if the translator is able to do written translation from English into German and the particular project is about translating a written document from English into German, then the system will automatically include this vendor as sufficient for handling the task.
- Translator is available for doing translation. The availability of a translator is managed in translators' section – in translator's account card manager checks the availability box, if the translator is able to handle translation projects.

2. Translator service – the system automatically supplies the manager with available vendors list, which comply with the following requirements:

- Language pair stipulated in relevant Document data is the same as the particular proofreader is able to provide. In other words, if the proofreader is able to do proofreading of a translation from English into German and the particular project is about translating a written document from English into German, then the system will automatically include this vendor as sufficient for handling the task.
- Translator is available for doing this task (either of selection, literary editing, validation, layout, proofreading). The availability of a proofreader is managed in translators' section – in translator's account card the manager checks the availability box, if the proofreader is able to handle translation projects.

! Please note that the information about translator service providers is stored in the same section of translators.

Languages	Type	From language	Into language	Language proficiency
	Written	German	Russian	Highest level (C2)
	Price (Regular/Urgent)	2.00	4.00	USD
	Written	English	Russian	Highest level (C2)
	Price (Regular/Urgent)	2.50	4.50	USD
	Written	Latvian	Russian	Highest level (C2)
	Price (Regular/Urgent)	2.40	4.00	USD
	Written	French	Russian	Highest level (C2)
	Price (Regular/Urgent)	3.00	5.00	USD
	Add			

Other service	Language	Type of service	Price (Regular/Urgent)		
	English	Proofreading	2.00	3.50	USD
	Latvian	Proofreading	2.50	4.00	USD
	German	Layout	3.00	4.00	USD
	Add				

3. DTP – the system automatically supplies the manager with a list of designers. System will include all designers, whose status is “Available”. Similarly as with translators and proofreaders, designers’ availability status is maintained in Designers subsection (under Resources section).

4. Notary certification – the system automatically supplies the manager with a list of notaries. Since the notary account card consists of relatively small amount of data, there is no filter of selecting the notaries for notary certification. In other words, the system will bring up all notaries to handle notary certification task, no matter what language pair is set up.

5. Sworn translator – for this task type the system automatically brings up all translation agency manager accounts.

6. Other task – for this task type the system automatically brings up all translation agency manager accounts.

! If the translation agency lacks task type, it can be added upon request in a form of raising a system functionality development task to OCLanguage Support team.

7.5. How to add new pricelist

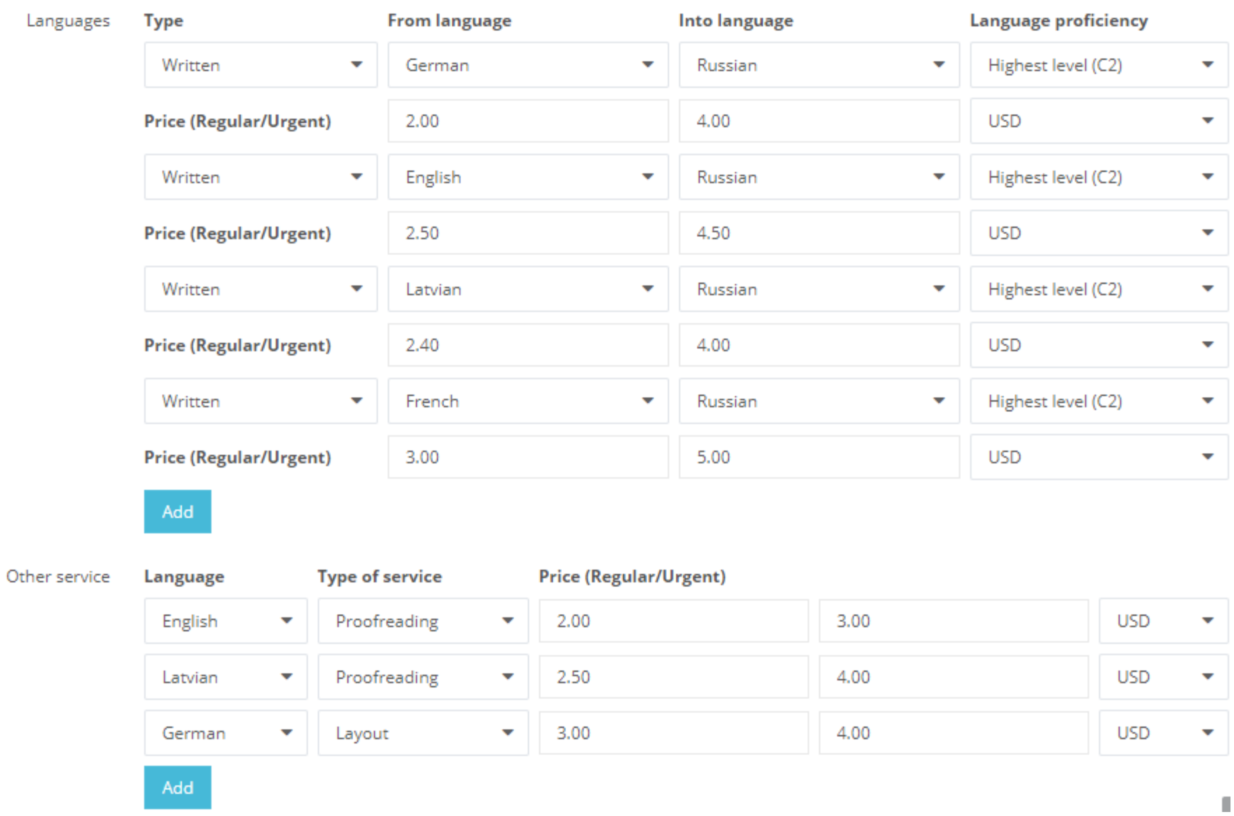
Pricelist section is created for conducting full automation of initial pricing quote release. The translation agency manager is able to add as many pricelists, as it needs. Pricelists can be assigned to language pair and/or the Customer. In fact, one Customer could be having several pricelists for the same language pair.

! Please note that a pricelist will pop up in project task only if the pricelist currency and project currency are the same.

In this section we will look at two types of pricelists:

1) Pricelists for oral and written translation, DTP and Notary approval
2) Pricelist for translator services (literary editing, validation, layout, proofreading).

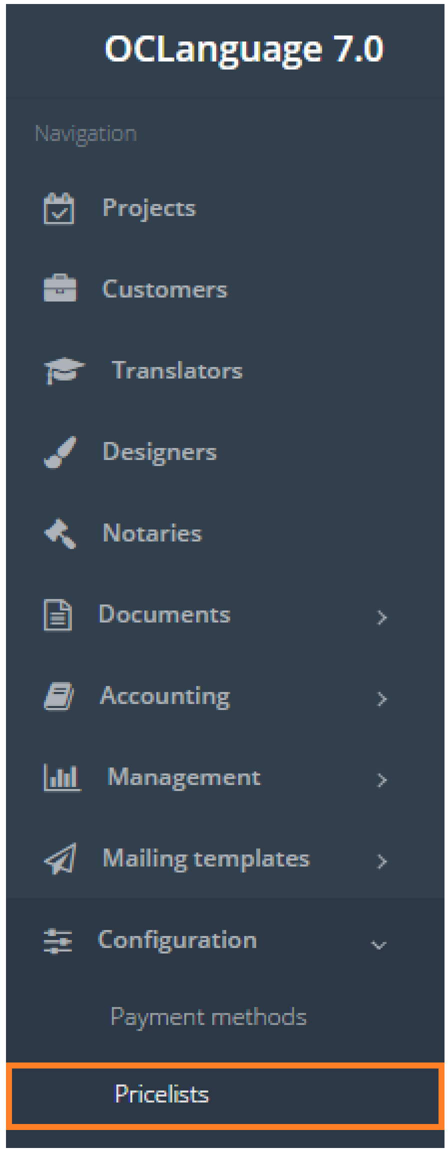
For both aforementioned task groups the system has corresponding predefined honorarium rates for the vendor.



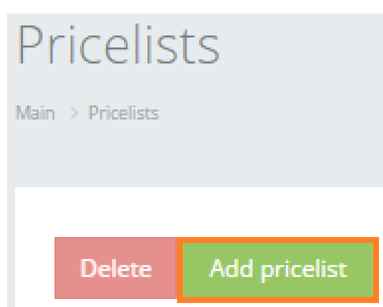
7.5.1. Oral and written translation, DTP, Notary approval

To add a new pricelist, follow the below steps:

1. In the navigation pane, click “Configuration -> Pricelists”.



2. Click “Add pricelist”. The system will open a new pricelist window.

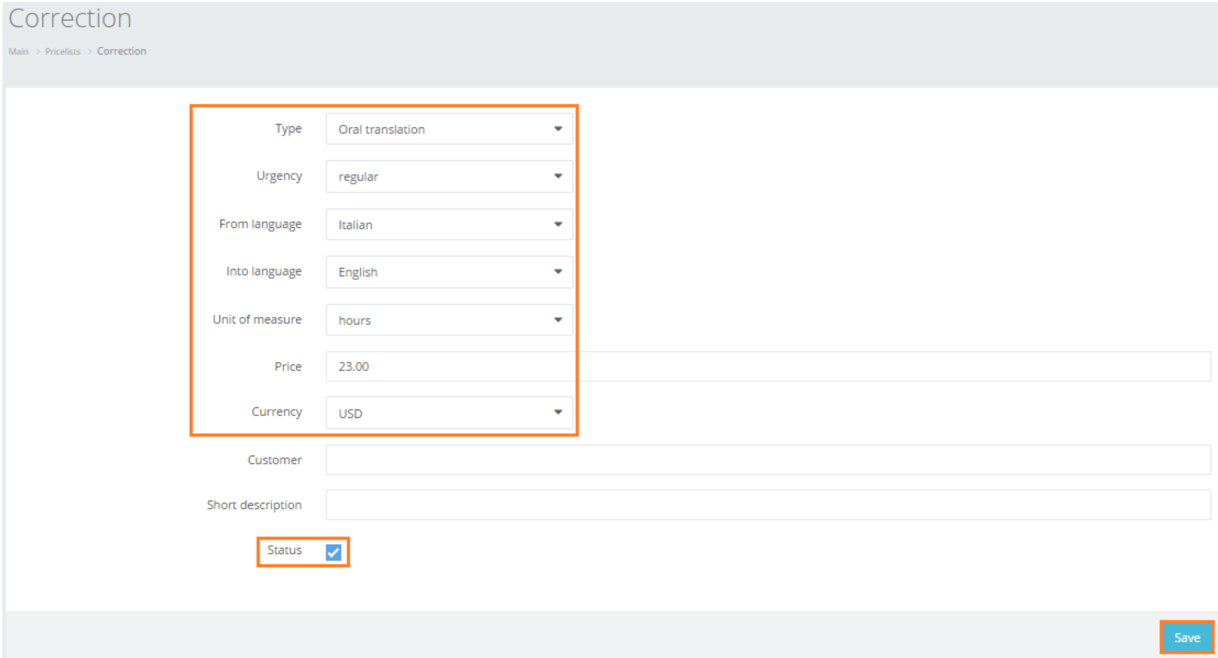


3. Fill in the pricelist related fields, which are described in the table below.

Field	**Description**
Type	Choose either of available task types:

	• Written translation • Oral translation • DTP • Notary certification • Sworn translator • Other task.
Urgency	Choose either of two options: • Regular • Urgent. ! Please note that the urgency status is directly connected with the urgency status in task data.
From language	Choose the language from which the translation will be processed
Into language	Choose the language into which the translation will be processed
Unit of measure	Choose either of options: • Characters • Words • Pages • Documents • Hours.
Price	Specify price per unit.
Currency	Choose currency.
Customer	In order to choose the Customer type in any of the following details related to him: • Customer name/surname • Company name • Contact details. Customer field is interactive, so after typing in the first letters or numbers the system will automatically bring up a relevant Customers' list.
Short description	Provide a short name or description of this pricelist. When the manager creates a new task in case of more than 1 pricelist that fits the translation data, the manager will be able to separate pricelists by using its names.
Status	Check the box, if you want this pricelist to be applied.

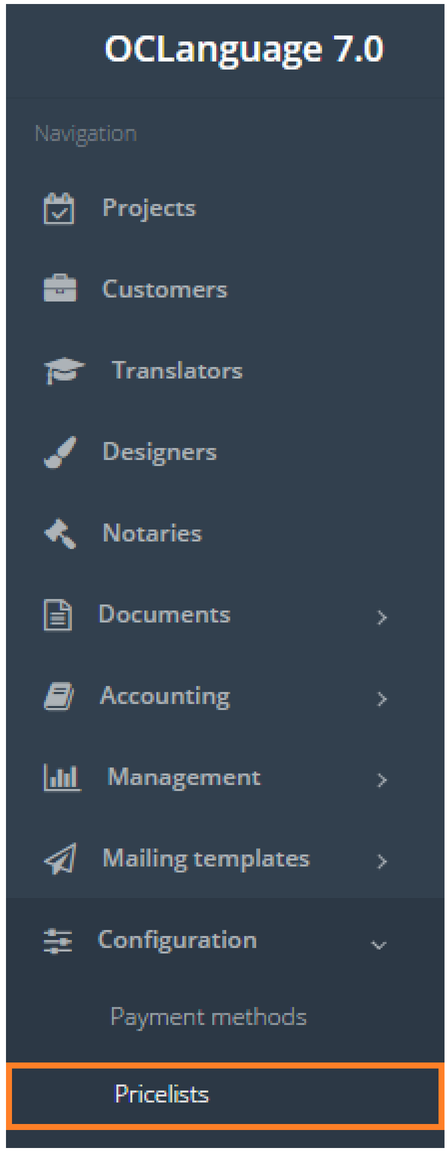
4. Click “Add” to save the pricelist.



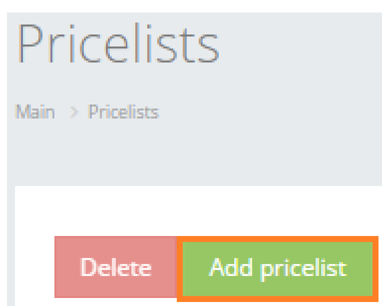
7.5.2. Translator service

To add a new pricelist for any of four translator services (literary editing, validation, layout and proofreading), follow the below steps:

1. In the navigation pane, click “Configuration -> Pricelists”.



2. Click “Add pricelist”. The system will open a new pricelist window.



3. Fill in the pricelist related fields, which are described in the table below.

Field	Description
Type	Choose either of available task types:

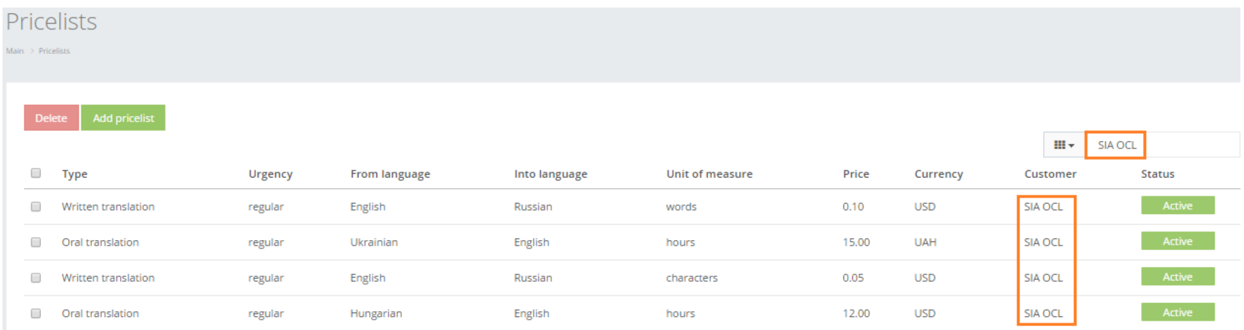
	• Written translation • Oral translation • DTP • Notary certification • Sworn translator • Other task.
Type of service	Choose either of translator services types: • Selection • Literary editing • Validation • Layout • Proofreading. ! Please note that for translation services the user specifies “From language”, but not “Into language” parameter.
Urgency	Choose either of two options: • Regular • Urgent. ! Please note that the urgency status is directly connected with the urgency status in task data.
From language	Choose the language from which the translation will be processed.
Into language	Choose the language into which the translation will be processed
Unit of measure	Choose either of options: • Characters • Words • Pages • Documents • Hours.
Price	Specify price per unit.
Currency	Choose currency.
Customer	In order to choose the Customer type in any of the following details related to him: • Customer name/surname • Company name • Contact details. Customer field is interactive, so after typing in the first letters or numbers the system will

	automatically bring up a relevant Customers' list.
Short description	Provide a short name or description of this pricelist. When the manager creates a new task in case of more than 1 pricelist that fits the translation data, the manager will be able to separate pricelists by using its names.
Status	Check the box, if you want this pricelist to be applied.

4. Click "Add" to save the pricelist.

User can filter data in the Pricelists database by using 3 methods:

1. Type letters or numbers in "Search" field and click "Enter".

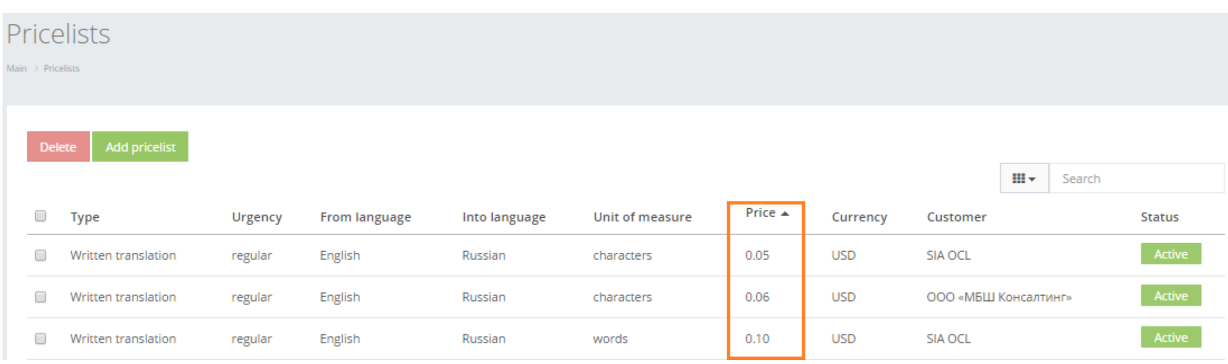


Below you will see a list of parameters (column names) the system searches data for:

- Price
- Currency
- Customer
- Language.

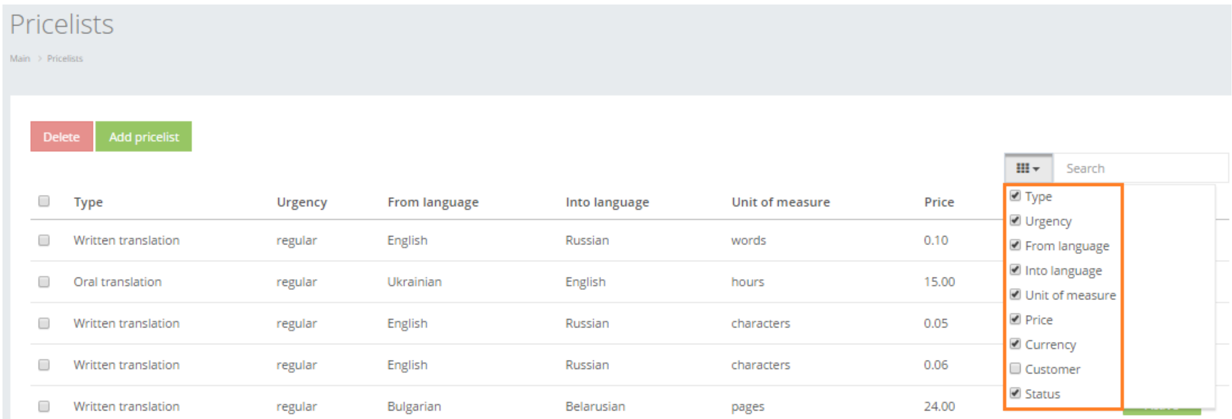
! Please note that data filter can be removed by deleting text in "Search" field and clicking "Enter".

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the Pricelists table. To add or remove particular column from the table, simply click and select the columns that you want (or do not want) to view in the pricelists database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.

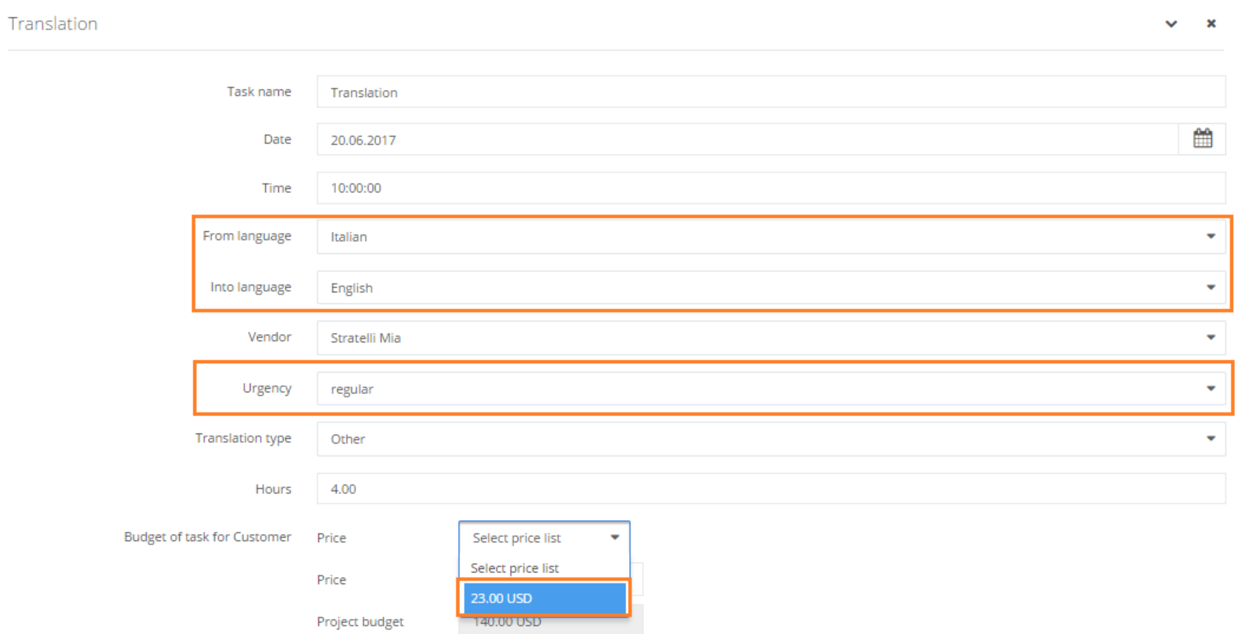


See below the Pricelists table content description:

Parameter	**Description**
Type	Translation task type: • Written translation • Oral translation • Translator service • DTP • Notary certification • Sworn translator • Other task.
Urgency	Translation task urgency: • Regular • Urgent. ! Please note that the urgency status is directly connected with the urgency status in task data.
From language	Language from which the translation will be processed.
Into language	Language into which the translation will be processed.
Unit of measure	Measurement options: • Characters • Words

	• Pages • Documents • Hours.
Price	Price per unit.
Currency	Currency in which the pricelist is set up.
Customer	Customer that the pricelist is assigned to.
Status	Choose either between both pricelist statuses: • Active • Inactive.

When a new task is added for parameters (language pair, urgency and general status) that the system has pricelists for, right after filling the task type and urgency data the manager will see available pricelists in “Budget for task” field. For particular task budgeting purpose the user should choose one of the available pricelists.

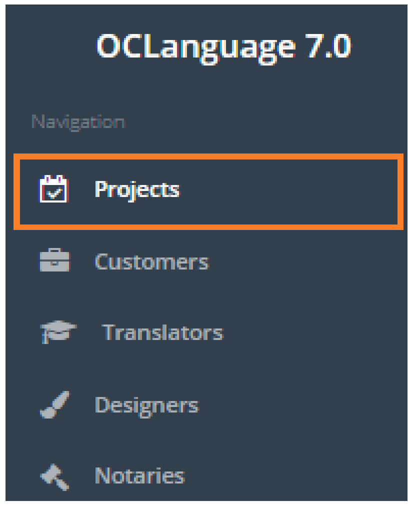


7.6. How to issue appendix to agreement

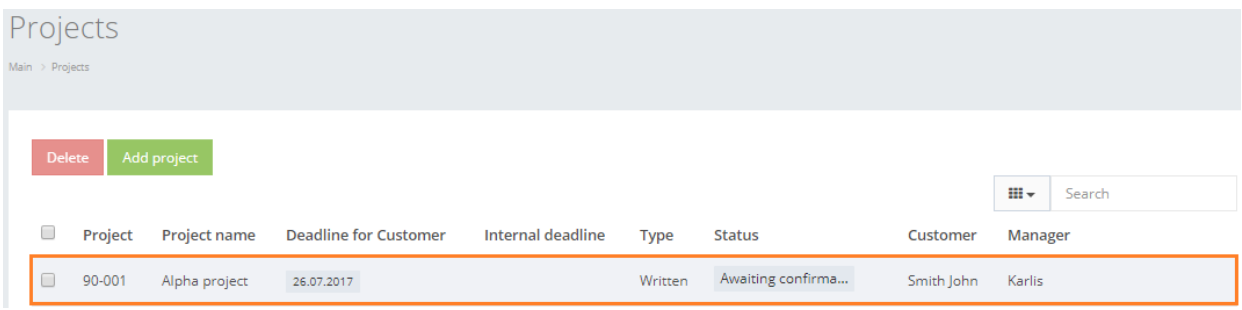
OCLanguage represents a tool for autonomic creation of appendices to general cooperation agreement with the Customer. This document includes information about particular project that the translation agency has supplied its services for.

To create a new appendix to the corporate agreement go through the following steps:

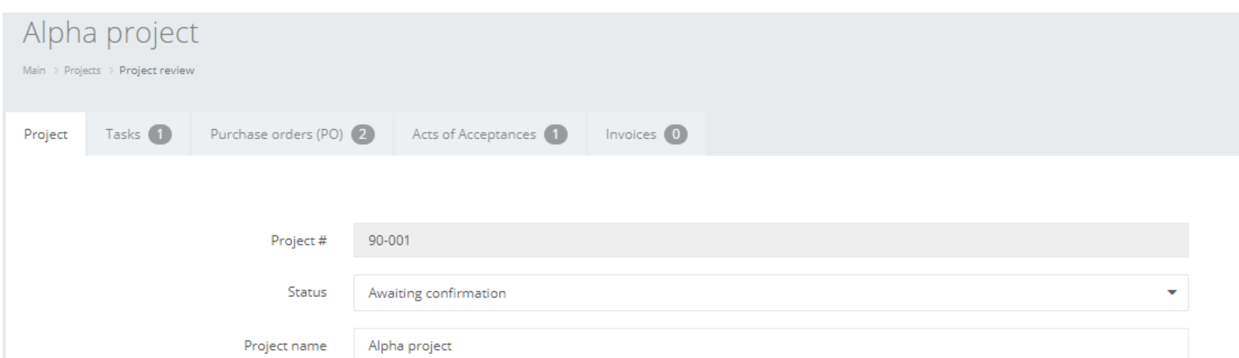
1. Under the main menu click “Projects”.



2. Click particular project.



3. The system will open the project details.



4. Click “Issue agreement”.

The system will generate a document in .pdf form and open it in a new tab.

Appendix creature module is used on case-by-case basis, thereby similarly to agreements, appendices are not stored in a separate system section.

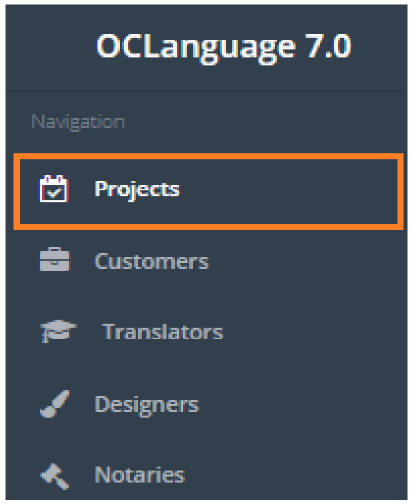
Detailed information about the structure of the above described document can be found in user manual "5.5. Appendix to agreement".

7.7. How to issue invoice for project

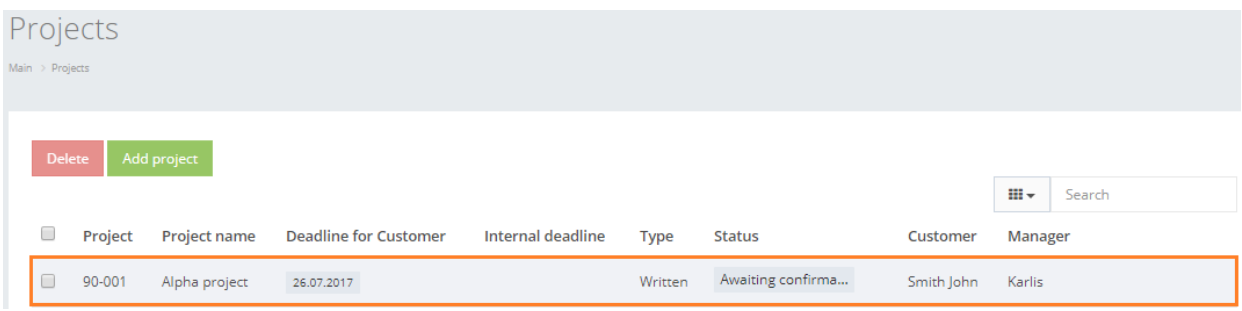
The system allows the user to create many tasks for the translation project. However, in the background it is still possible to issue various types of invoices. The system allows issuing one or several invoices for one project. Everything is tailored to the Customer's needs.

The manager should take the following steps to issue an invoice for the project:

1. Under the main menu click "Projects".

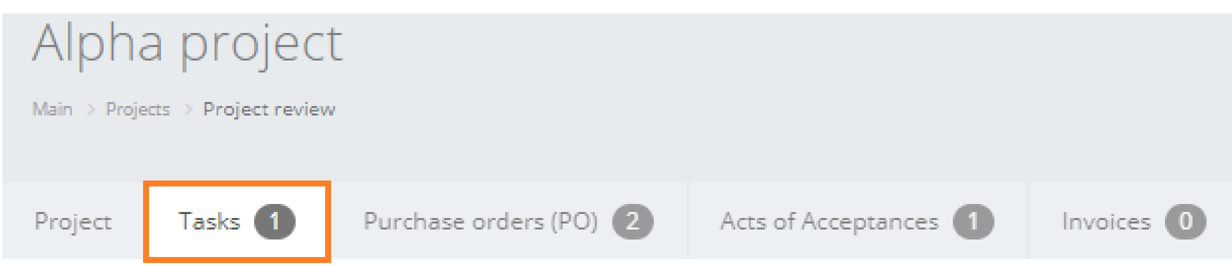


2. Click the project you want issue an invoice for.

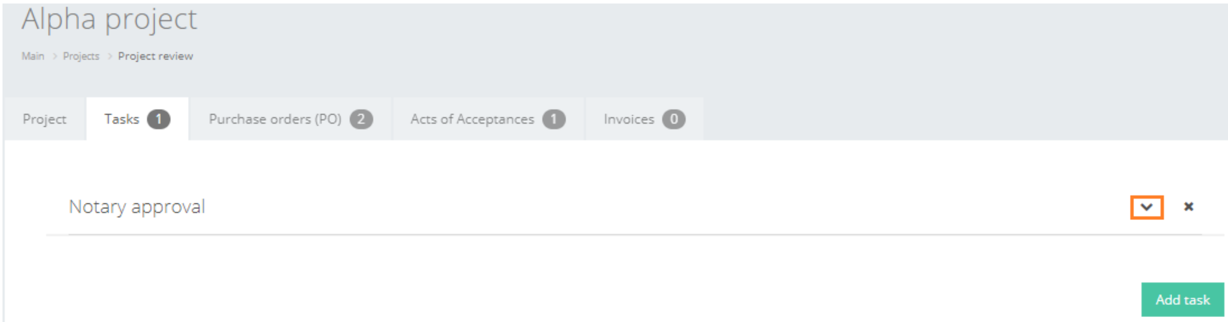


3. The system will open a general window of project management. Mark all needed tasks to be included in the invoice. If the user wants to issue the invoice for the whole project, then it simply needs to include all tasks in the invoice. To include a task in the invoice, go through the following steps:

3.1. Click "Tasks" sheet.

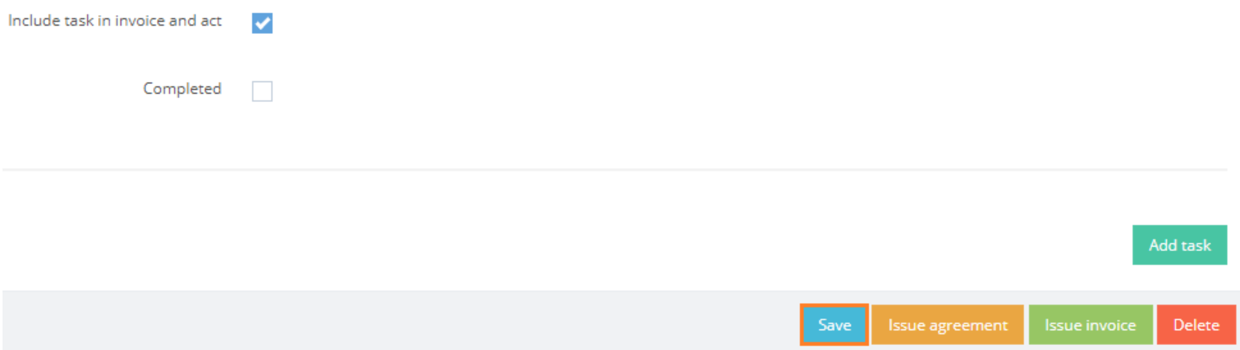


3.2. Click check box icon ⌄ to open task data.



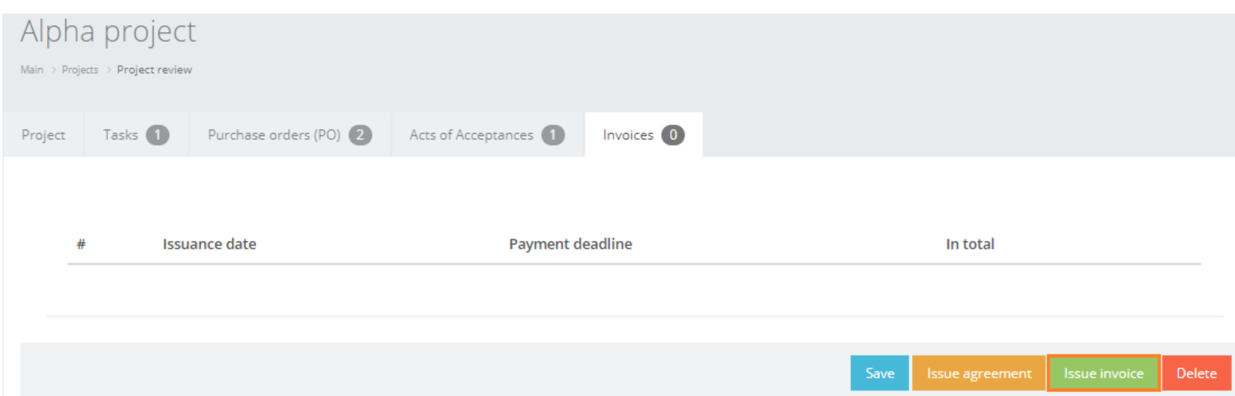
3.3. Check box “Include task in invoice and act”.

3.4. Click “Save”. The system will reload a project data window.



After the user has marked all tasks, that he wants to include in the invoice, click “Issue invoice” in the general project management window.

! Please note that “Issue invoice” option is available in all project management sheets (Project, Task, Acts of Acceptances, Invoices).

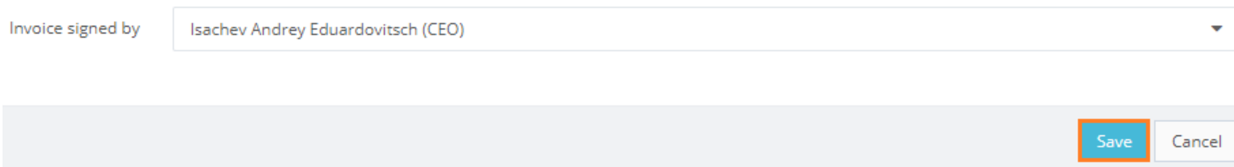


5. The system will supply the manager with pre-invoice window. Review all data in pre-invoice window and make corrections, if needed. See below the description of pre-invoice window fields.

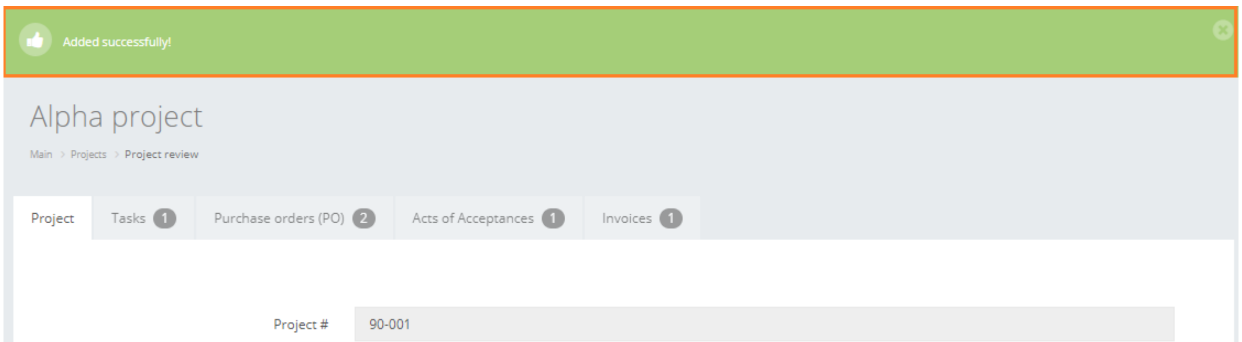
Field	**Description**
Name	Invoice name
Number	Unique invoice number – this parameter is adjusted to the translation agency's internal standards
Invoice date	The system automatically supplies the user with actual date, however, the user is able to change this date
Order deadline	Deadline for project submission to the Customer
Payment due date	The system automatically counts payment due date based on the formula: Invoice date plus credit days for the Customer
Contact person	Contact person of the Customer
Payor	Customer's name, surname (Individual) or Company name (Legal entity)
Personal code	Individual's personal code
Registration No.	Legal entity's registration number
Address	Individual's address
Legal address	Company's legal address
Actual address	Company's actual address
Job name	Job name coincides with the task name. If the user wants to change the job name, it can be done in details window of the particular task.
No discount available	The system will say "Yes", if a particular task does not receive discount. System will say "No", if a particular task receives discount.
Unit	Unit of measurement
Amount	Unit amount
Price	Price per 1 unit
Total, currency	Total price of every task
Total	Total price of all tasks
Discount applicable	Total amount, from which discount will be calculated
Discount	Discount amount. The user is able to set the discount either in percentage or in amount.

	“(Customer discount)” – this hint reveals general discount amount for the particular Customer. Number in field right to “Discount” box reveals predefined discount for this project (the user defines it in project details): 
Total with discount	Total amount with discount
VAT	VAT rate – choose from available rates. Additional rates are set up upon request to OCLanguage support team
Total	Total amount for payment
Invoice signed by	Choose a representative of translation agency, who will be signing the invoice. ! Please note that the system will include translation agency manager in this list only if it has the authority of signing invoices (user rights can be edited in “Users” section).

7. To finish the creation of invoice click “Save new invoice”.

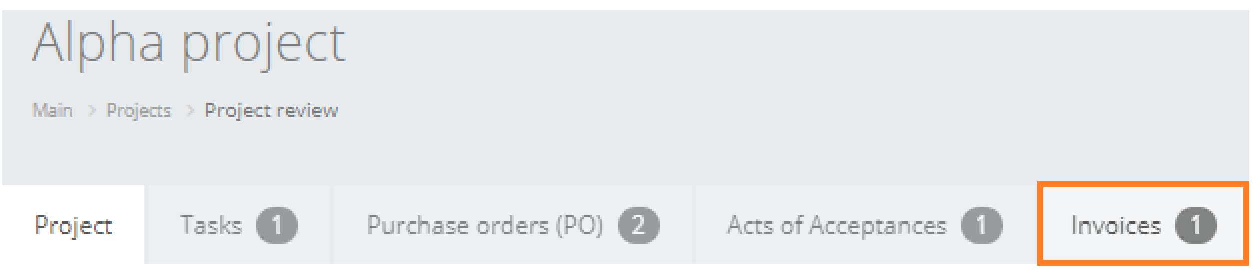


8. The system will lead the user to general project management window. If the invoice was saved, the system would reveal the text message “Added successfully!”.

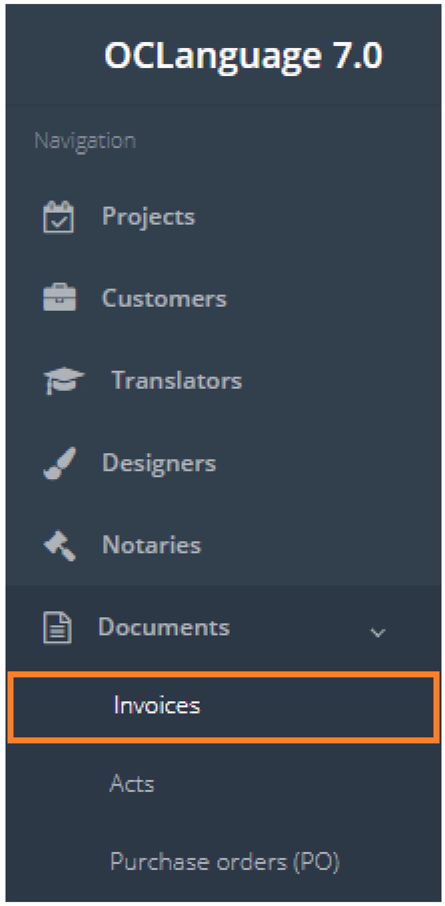


To view the invoice, take either of following 2 steps:

1. In particular project click “Invoices”.



2. Open “Invoices” database (in the main menu click “Documents” -> “Invoices”).

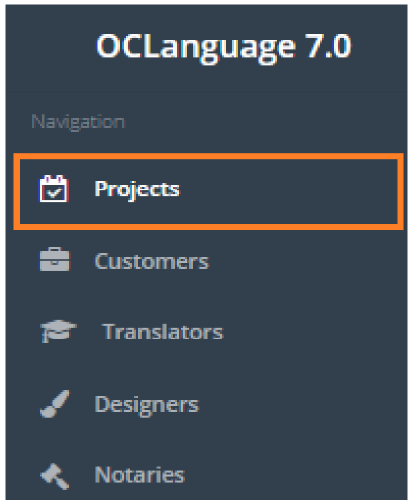


7.8. How to send invoice to Customer

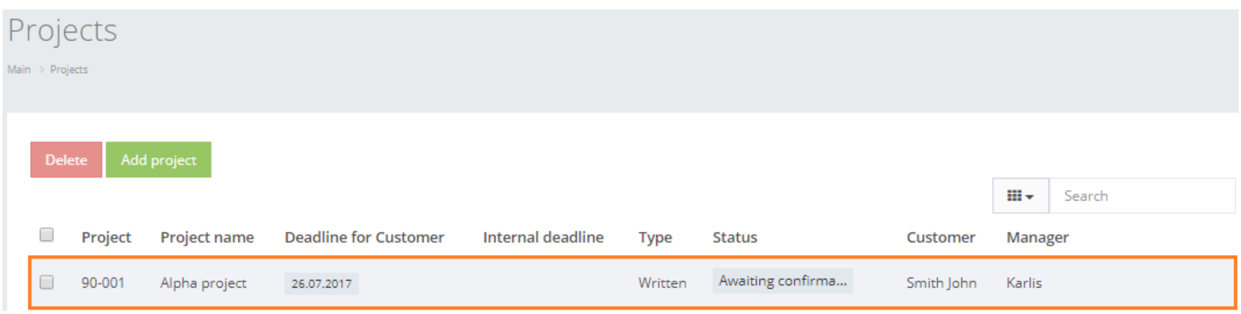
7.8.1. Send from project management window

In order to send an invoice from the project management window take the following steps:

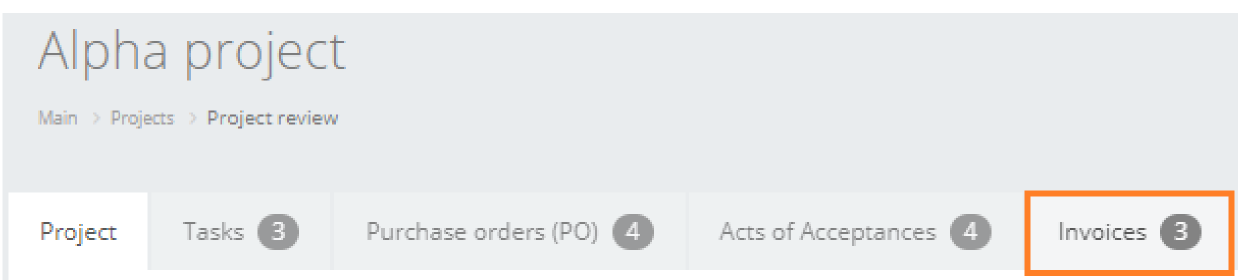
1. Open “Projects” database.



2. Click a particular project.



3. Click “Invoices” tab.

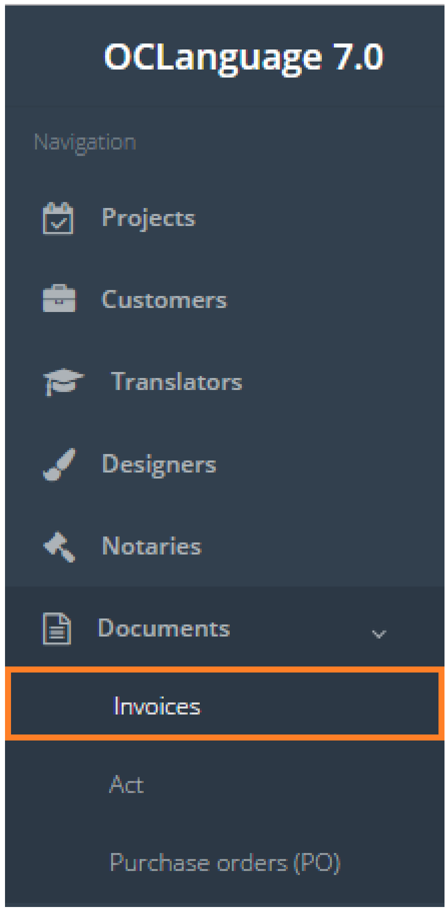


4. Click () to send a particular invoice to the Customer’s specified address for receiving invoices.

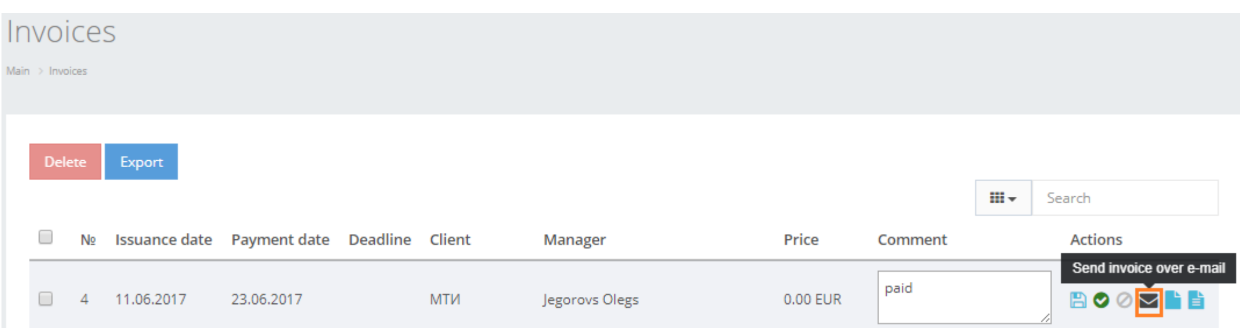
7.8.2. Send from “Invoice” database view

In order to send an invoice from “Invoice” database view, take the following steps:

1. Browse “Documents -> Invoices”.



2. Click () to send an invoice to the particular Customer’s e-mail address.



7.9. How to issue Act of acceptance document

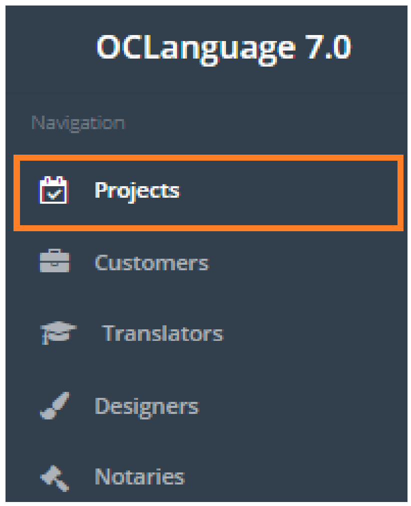
OCLanguage represents a tool for autonomic creation of Act of Acceptance document.

7.9.1. How to create an act

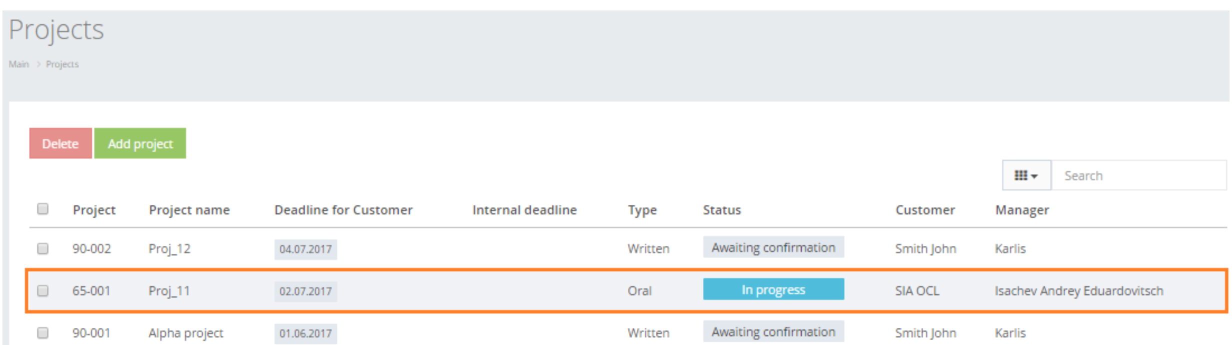
! Please note that acts are created per project tasks. Which means, that every task, that the user has selected to have Act of acceptance, will have one act.

To generate a new act take the following steps:

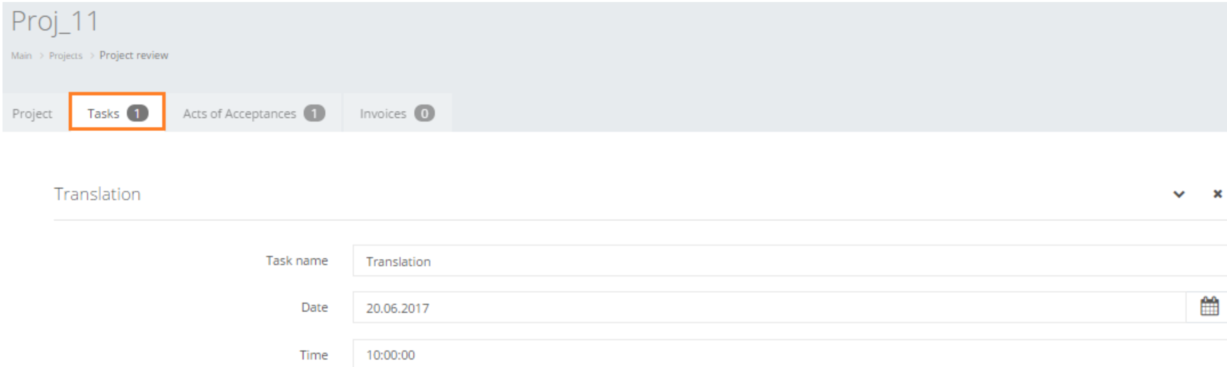
1. Browse "Projects" database.



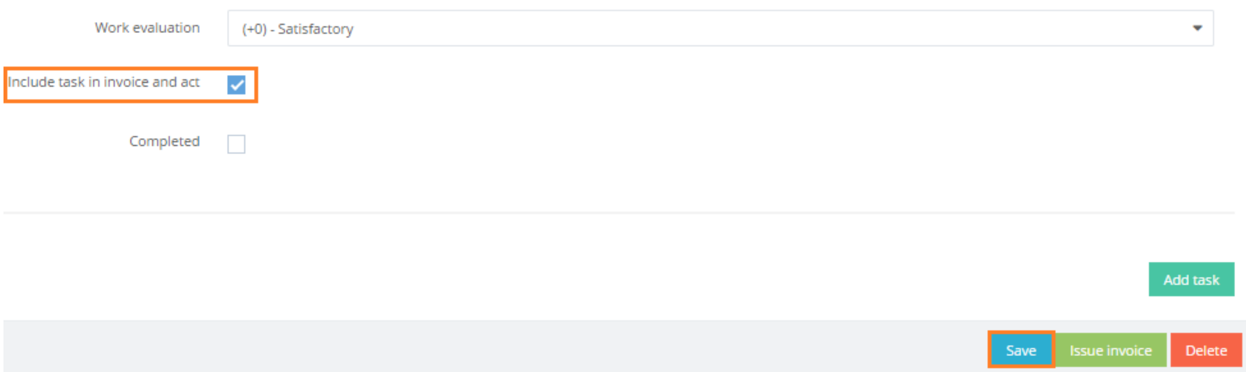
2. Browse a specific project.



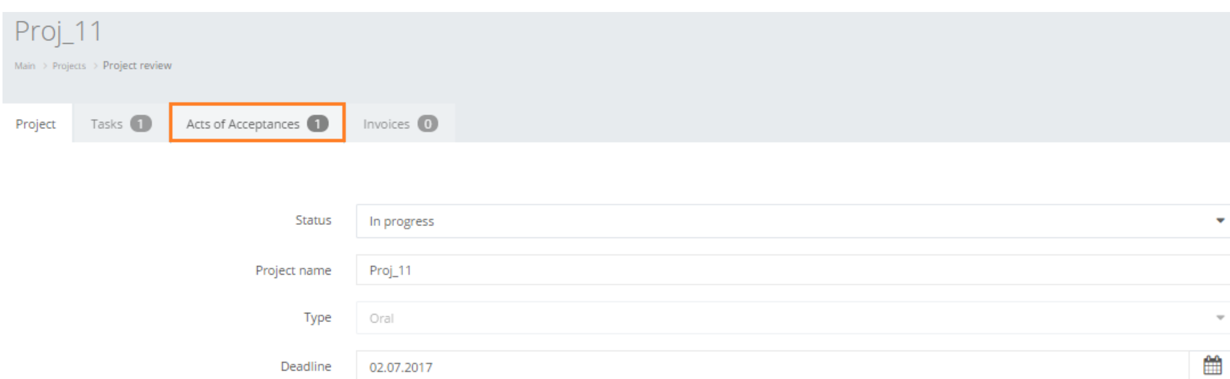
3. Browse “Tasks” section.



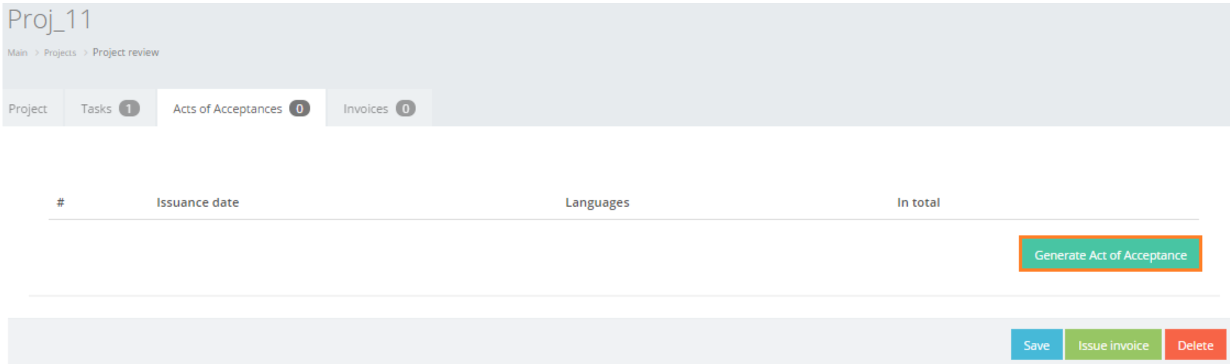
4. To include a particular task in the act, in task details check the box “Include task in invoice and act” and click “Save”.



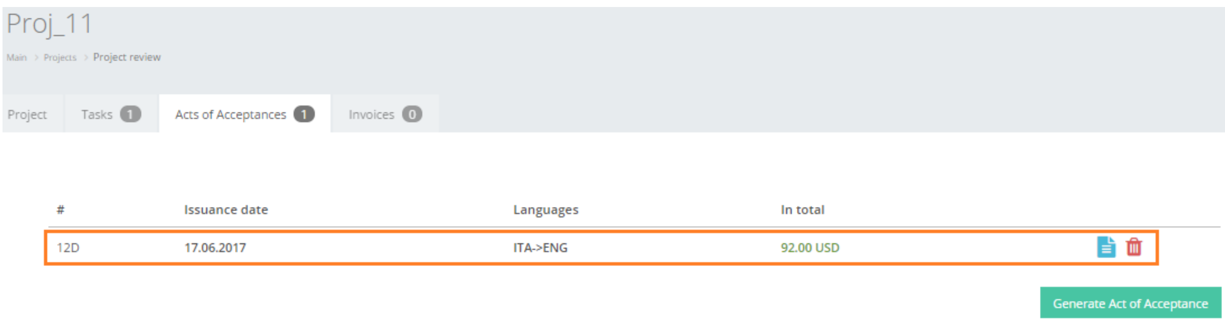
5. Click “Acts of Acceptances” to open the acts database.



6. Click “Generate Act of Acceptance”.

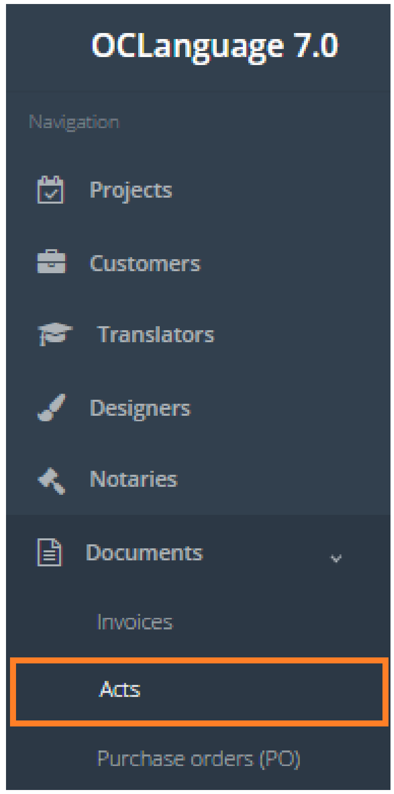


7. OCLanguage will generate a new act and reveal it in general table. In addition, the user can browse all acts in Acts database (in main menu “Documents” -> “Acts”), described in documentation section “5.3. Acts of Acceptance”.



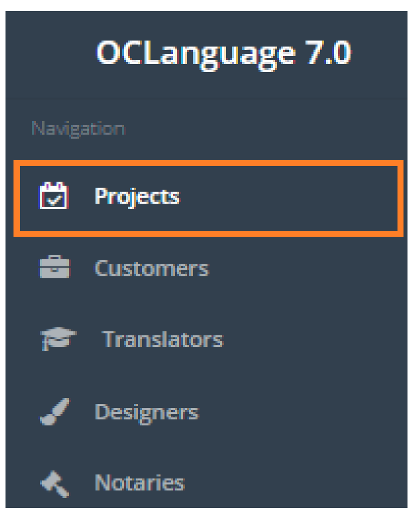
7.9.2. How to browse project acts

To view the Acts in the main menu click “Documents” -> “Acts”.

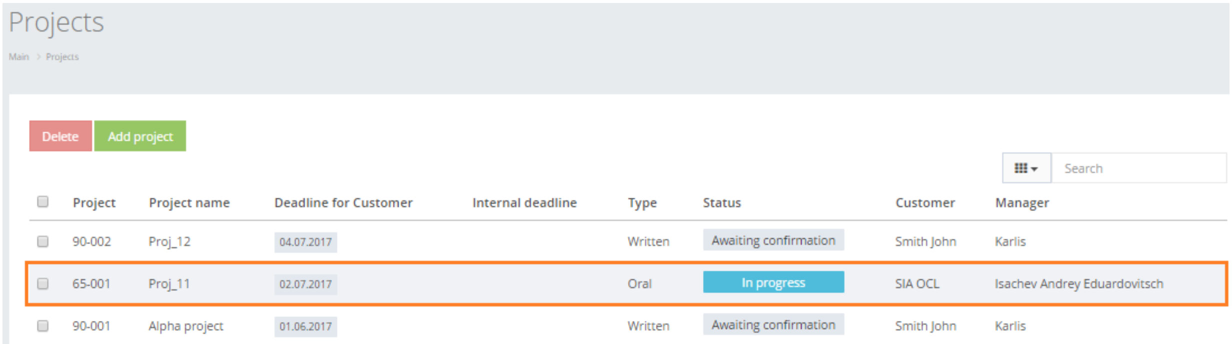


User can browse all Acts related to a particular project going through the following steps:

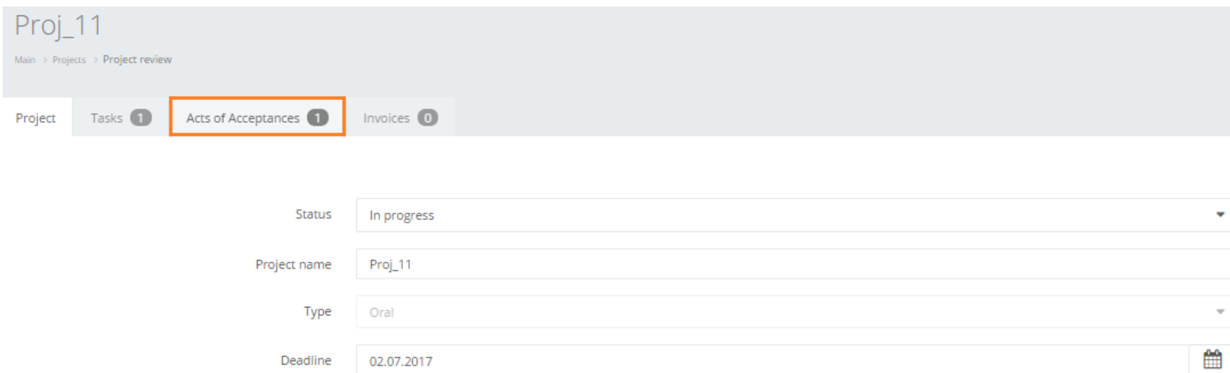
1. Browse “Projects” database.



2. Browse a specific project.



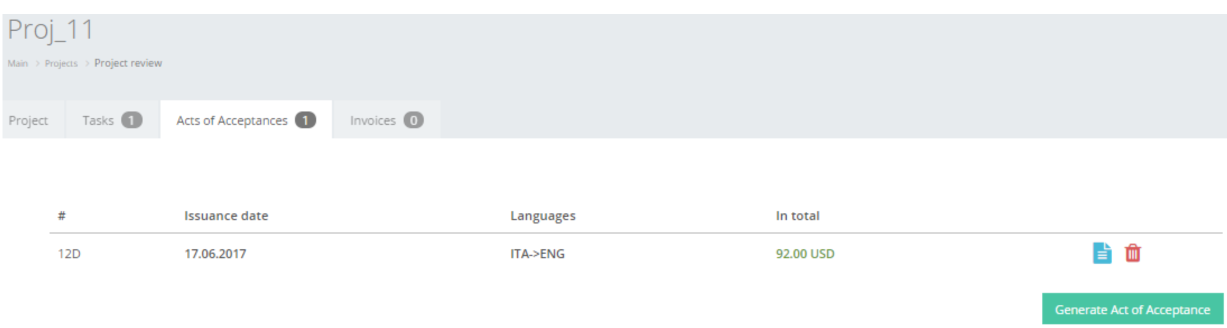
3. Browse “Acts” section.



4. The system reveals all acts related to specific project, showing data described in table below.

Data	Description
Act #	Unique Act #
Issuance date	Act issuance date
Languages	All language pairs in the act
In total	Total amount to be paid by the Customer
	Click to open the act in a new window (.pdf format)
	Click to delete the act

Project acts table is revealed in the image below.



Acts database and its related features are described in documentation section “5.3. Acts of Acceptance”.

In issued act the system will add only 1 line, with description, amount and price information as per the actual task.

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+38 (044) 287-11-63

01033, Ukraine, Kiev, Saksaganskogo Street 39-B, office 3

Act of Acceptance #28C
Of supplied services (performed tasks)
at 06.05.2015

Private enterprise «Translation agency Bridge» on behalf of Director, Maxim Lobachevskiy, (hereinafter "Contractor") from one side and SIA OCL (hereinafter referred to as "Customer"), represented by ____, from other side, agree on this Act, that Contractor supplied Customer with following services (tasks performed):

#	Service name	Unit	Quantity	Price	Total
1	Перевод 1-го документа	Page	73	699.00	51000.00
				Total:	**51000.00**
				Without VAT:	**-**
				In total:	**51000.00**

Total quantity of services 1, for total price: 51000.00 RUR without VAT

By signing this Act, both parties confirm that they have fully met their obligations and do not have any claims to each other (including property, financial or other). The act is made in two copies, one for each party.

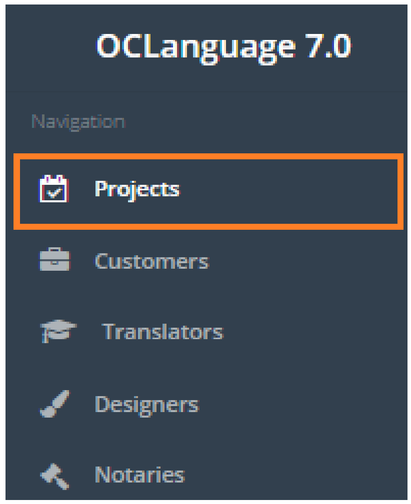
CONTRACTOR:	CUSTOMER:
Private enterprise "Translation agency Bridge" Chamber of Commerce A01 #372328 at 15.02.2011. Company Registration # 37481035, Bank account: 26001901349162 (OTP Bank), Kiev, MFI 300528 Address: Kiev, 01033, Saksaganskogo Street 39-B, office 5	SIA OCL
____________________ Lobachevskiy M. Stamp	____________________ Stamp

7.10. How to send Act to Customer

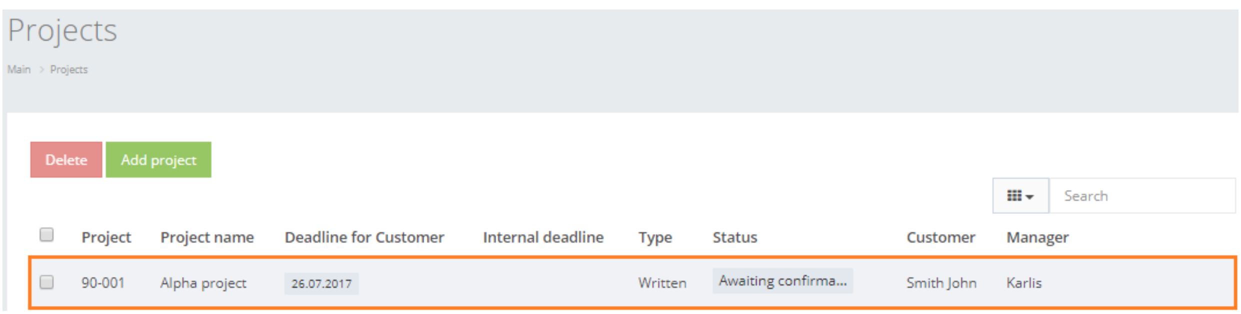
7.10.1. Send from project management window

In order to send an act from the project management window take the following steps:

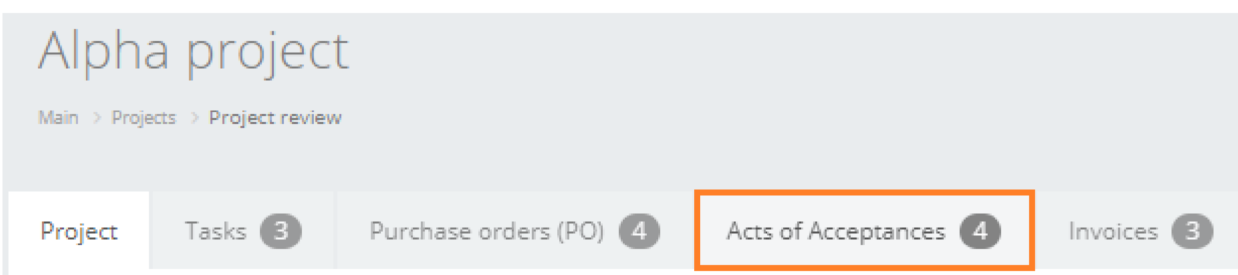
1. Open “Projects” database.



2. Click a particular project.



3. Click “Acts” tab.

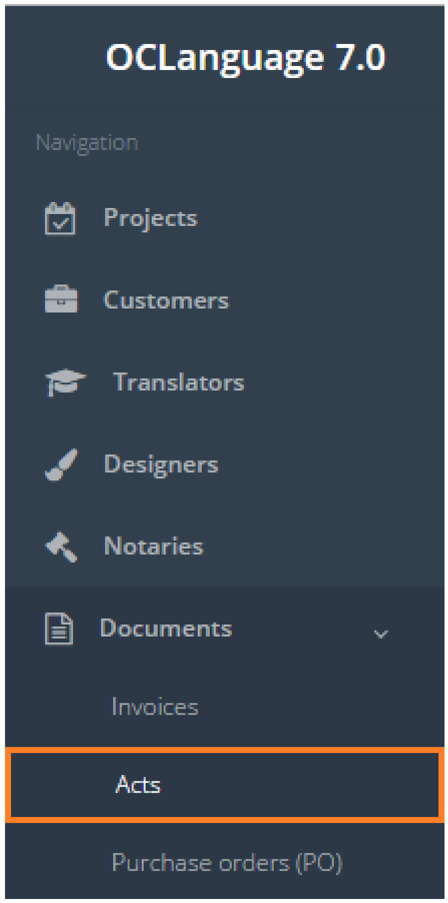


4. Click () to send a particular act to the Customer’s specified address for receiving acts.

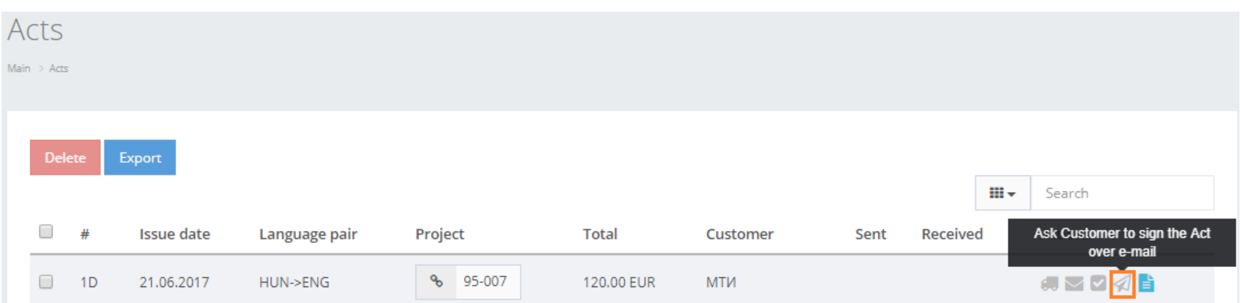
7.10.2. Send from “Acts” database view

In order to send Act of Acceptance from the “Acts” database view, take the following steps:

1. Browse “Documents -> Acts”.



2. Click () to send an act to the particular Customer’s e-mail address.



7.11. Discount management

Discount for the Customer project is managed in 4 levels:

1. In Customer's data

2. In project data

3. In project tasks data

4. During invoice preparation stage.

Description below reveals logical sense behind all four mechanisms.

! Please note that the project discount supersedes the Customer discount. Which means, if the Customer's discount is 1%, but project discount accounts for 2%, in preliminary invoice window by default the system will put 2%.

1. In Customer card the translation agency manager can set up discount level for all projects that will be placed. The discount can be specified only in percentage. Once the discount is saved, the system user always will be told, what is the default discount level for the particular Customer. The user can see this information in the following sections:

a) in Customer's data

Discounts

4

b) in project data

Discount (%)

2.00

c) in task data the user can disable discount for particular task by checking the box "No discount available for this item"

No discount available for this item ☑

d) in preliminary invoice window under "Notes" the manager sees the Customer discount and next to "Discount %" he sees the particular project discount.

If there is a certain amount of tasks (calculated total value in $), that are going to be discounted, then the system will reveal it in "Discount applicable".

	Discount applicable	0.00
(Notes: 4)	Discount % ▼ 2.00	0.00

In this case in the preliminary invoice window in line “No discount available” the system will reveal value “Yes”.

Job name	No discount available
Notary approval	Yes

As the last stage of discount management the user is able to change the discount in the preliminary invoice window. As written above the system informs the user about the Customer’s discount, project discount and discount prohibitions, if any. If the invoice consists of at least 1 task, which is set up to be discounted, the system user is able to revise discount level by specifying it either in percentage or in value. After this parameter is set up, the system will reveal the total amount for payment in line “Total with discount”.

Job name	No discount available	Unit	Amount	Price	Total. USD
Notary approval	Yes		0	0.0000	0.00
		Total			0.00
		Discount applicable			0.00
	(Notes: 4)	Discount % 2.00			0.00
		Total with discount			0.00
		VAT 18%			0.00
		Total			0.00

7.12. How to save payment to vendor

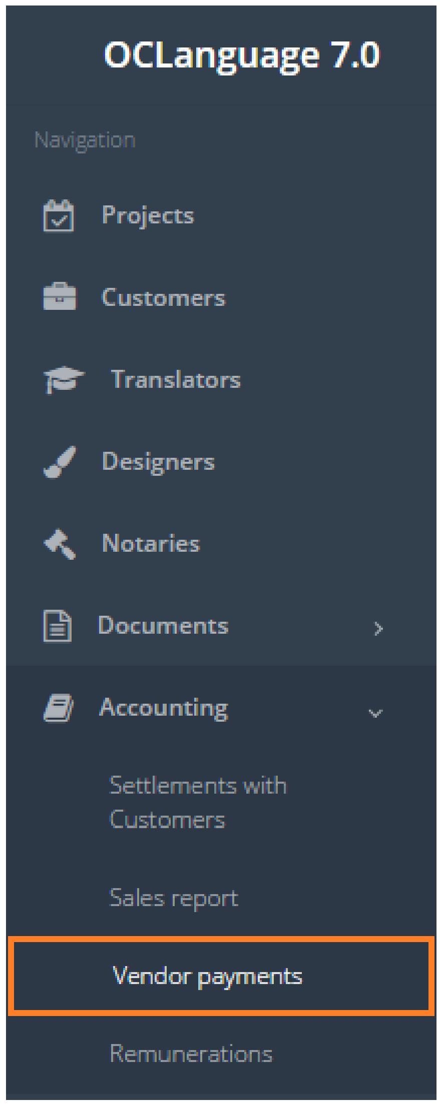
Payment to vendor is saved manually in the Vendor payments database.

To learn more about the Vendor payments database itself, browse manual “4.3. Vendor payments report”.

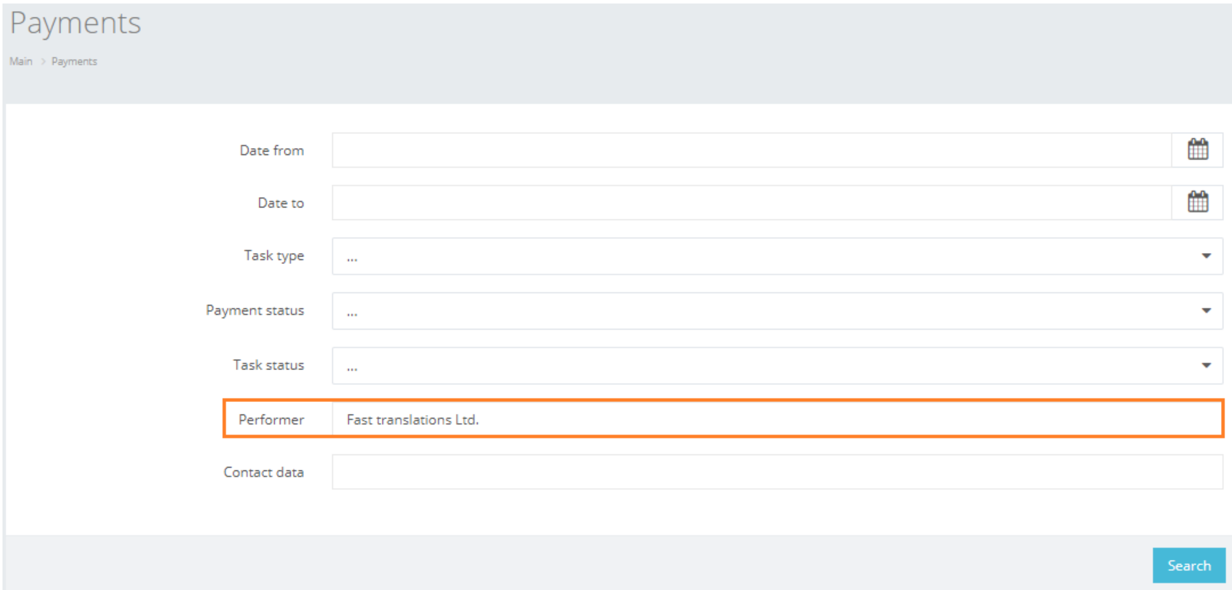
To see all historical payments to vendors database, browse manual “4.4. Payments to vendors history”.

Take the following steps to save payment to vendor:

1. To access it, in main menu browse “Accounting -> Sales report”.



2. By using a Search window sort the payments you want to execute. Each line in payments table represents one task for vendor. Which means that, if, for instance, the translation agency assigned 5 tasks to the vendor, the system will reveal exactly the same number (5 lines) of payments pending.

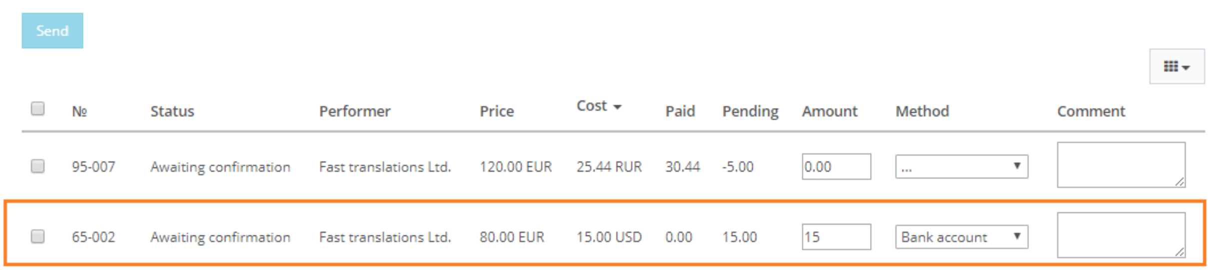


! Please note that if the system user saves full payment of task, it will remove this pending payment record from "Payments" table.

3. Check the box next to the payment line you want to execute money transfer.

4. Specify the amount and payment method.

5. Leave a comment, if needed.



6. Click "Send" button above the payment table to close payment(s).

! Please note that the user is able to add several payments data and approve by clicking "Send" button for one time.

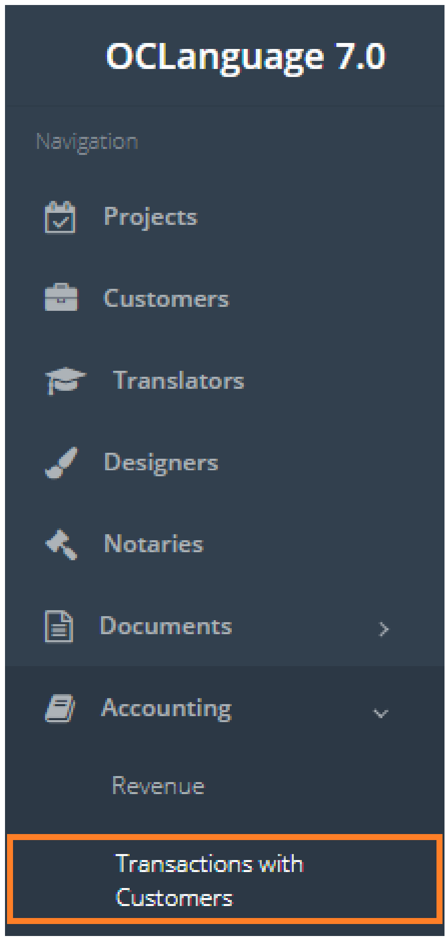
7.13. How to save incoming funds from Customer

Incoming funds from the Customer are saved manually in Transactions with Customers database.

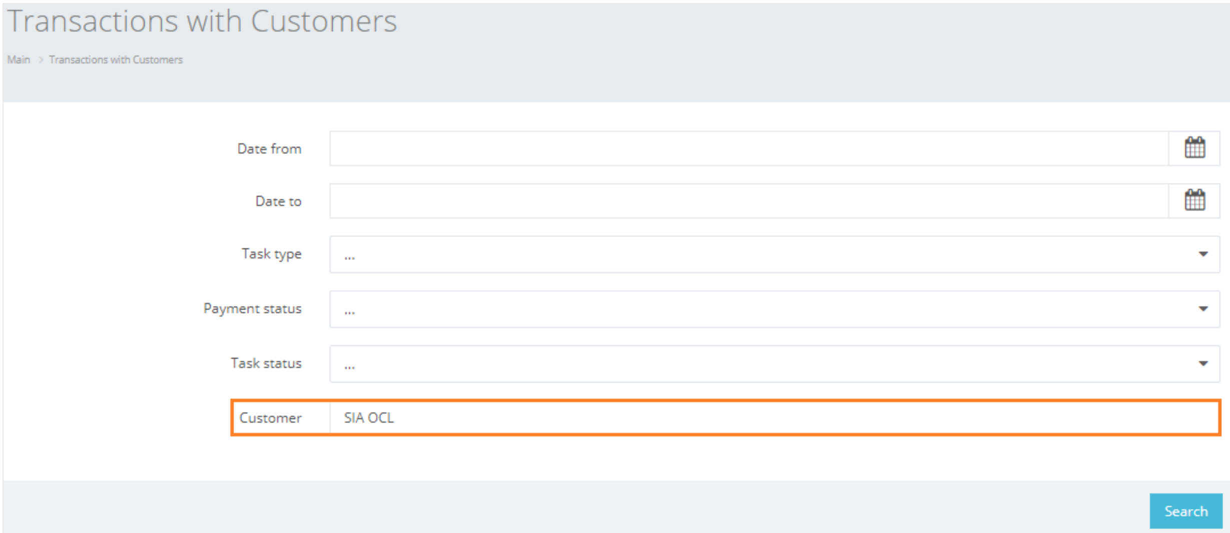
To learn more about Incoming funds database itself, browse manual “4.5. Settlements with Customers”.

Take the following steps to save incoming payment from Customer:

1. To access it in the main menu browse “Accounting -> Transactions with Customers”.



2. By using a Search window sort the payments you want to execute. Each line in payments table represents one task for vendor. Which means that, if, for instance, the translation agency assigned 5 tasks to the vendor, the system will reveal exactly the same number (5 lines) of payments pending.

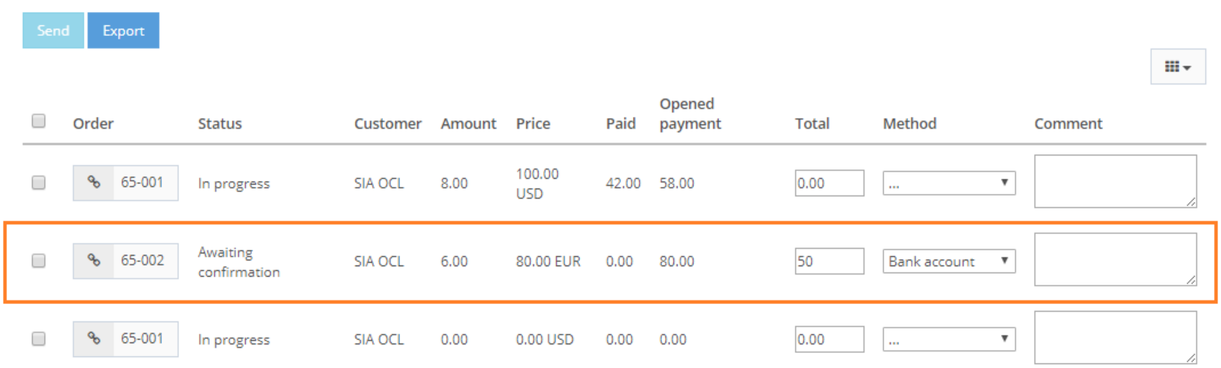


! Please note that, if the system user saves full payment of task, it will remove this pending payment record from "Payments" table.

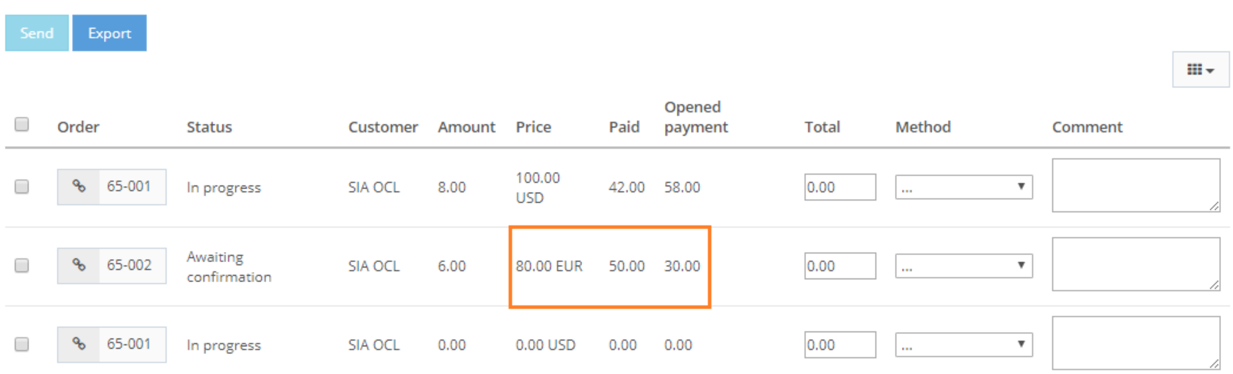
3. Check the box next to the payment line you want to execute money transfer.

4. Specify the amount and payment method.

5. Leave a comment, if needed.



6. Click "Send" button above the payment table to close payment(s). The system will update the table with new data, as the user can see on the image below.



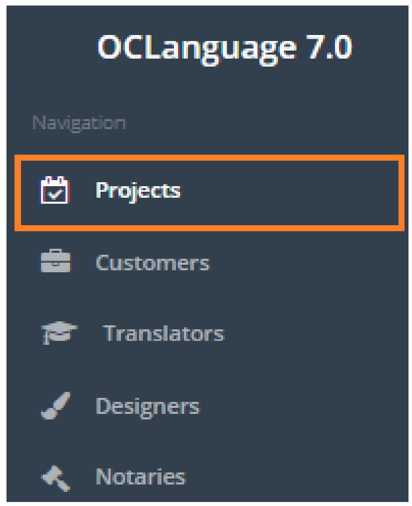
! Please note that the user is able to add several payments data and approve by clicking “Send” button for one time.

7.14. How to issue PO document for vendor

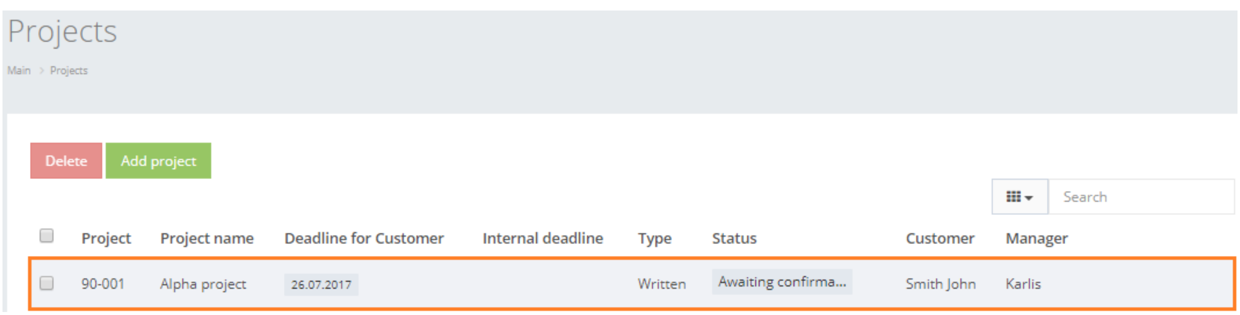
OCLanguage allows user to generate PO documents automatically for all kind of tasks (Translation, Translator service (selection, literary editing, validation, layout, proofreading), DTP, Notary certification, Sworn translator, Other task).

To create a new Purchase order (PO) for vendor services, go through the following steps:

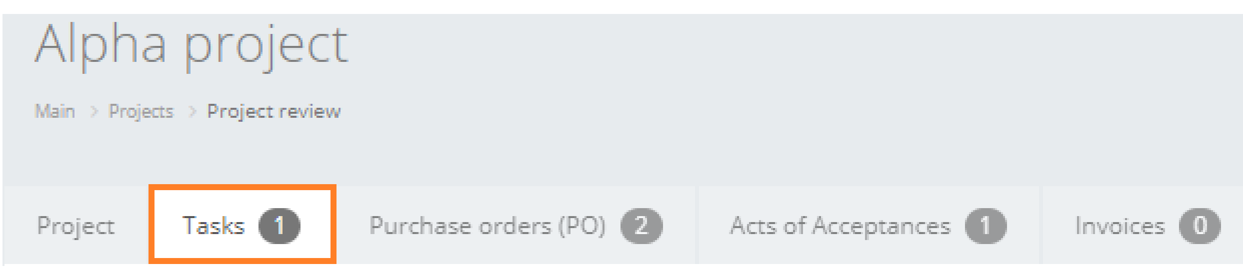
1. Open the project data in the main menu and click “Projects”.



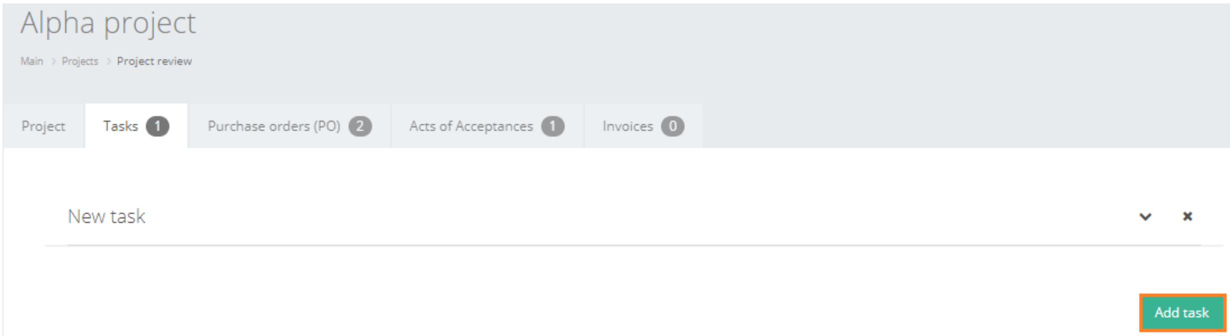
2. Click a particular project.



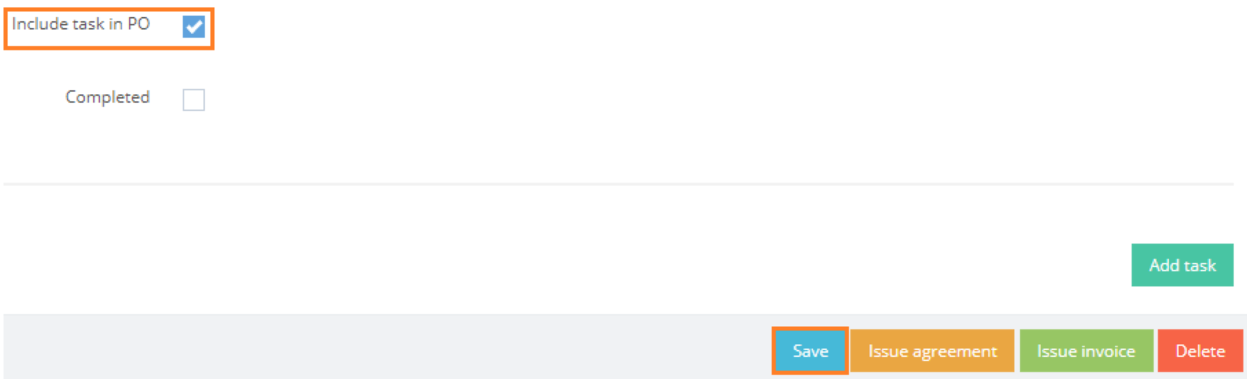
3. Click tab “Tasks” to open the Task window.



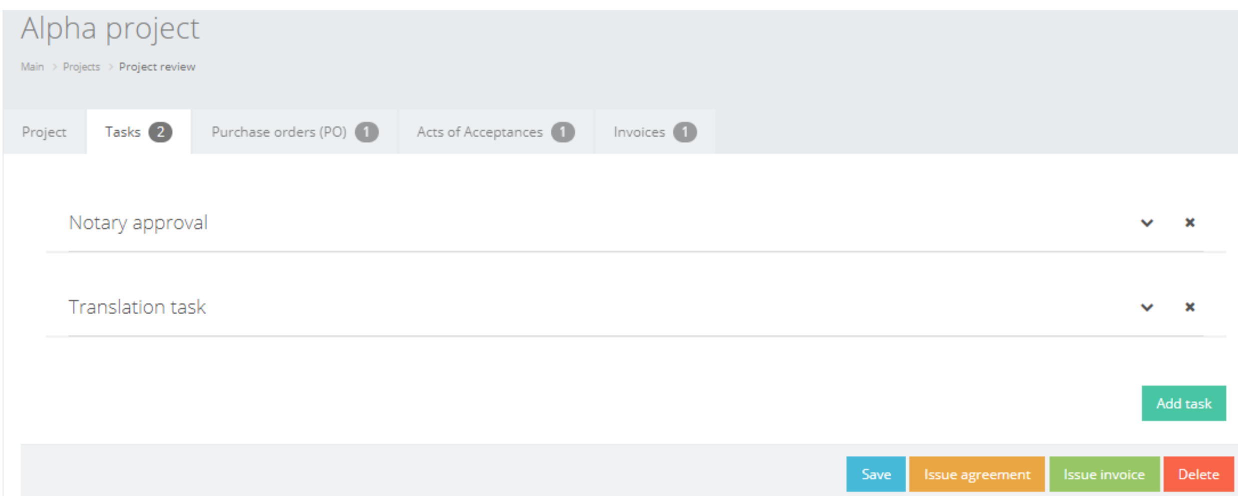
4. Click “Add task”.



5. Fill in the task data. To issue PO for this task, check the box “Include task in PO”. Click “Save”.

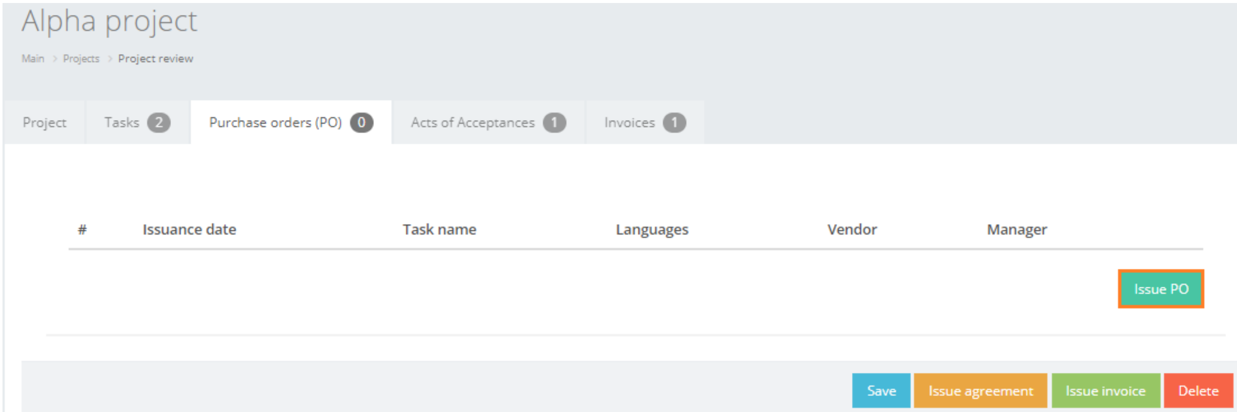


In “Tasks” sheet you can view all data about the actual tasks.

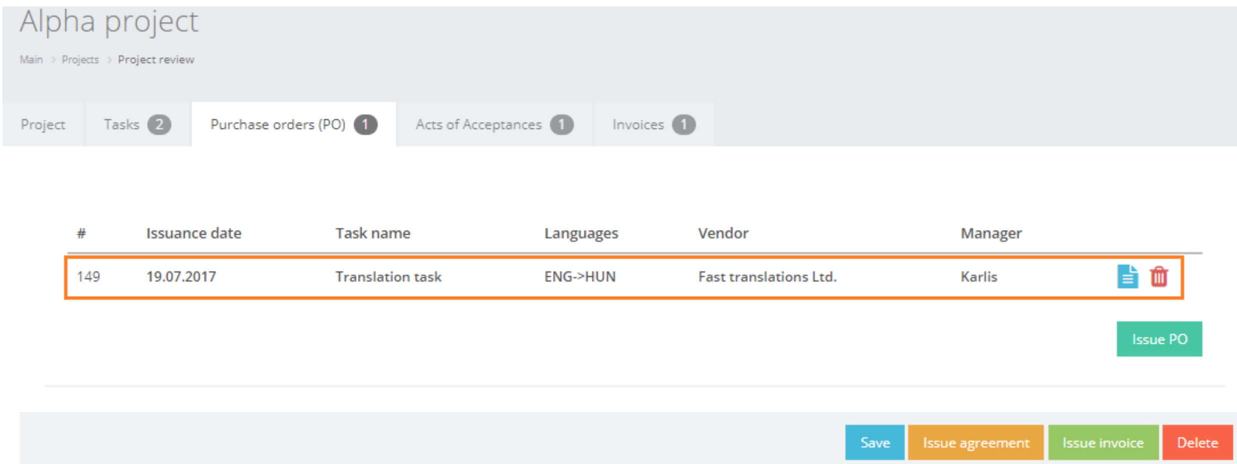


To create PO, click sheet “Purchase orders (PO)”.

Click “Issue PO”.



The system interface will be automatically reloaded and you will see a new PO generated.



Click to open PO in .pdf format (Internet browser will open a new tab).

Click to delete PO (the system will permanently delete the PO document).

! Please note that POs for particular project can be seen in project data (under “Purchase orders (PO) sheet) or in Purchase Orders database (accessible in main menu “Documents” -> “Purchase orders (PO)). More information about PO database is provided in user manual “5.2. Purchase orders (PO)”.

Below you can see that the vendor has received Purchase Order for this task.

Информация о задании Inbox x

sales@oclanguage.com
to me

9:14 AM (0 minutes ago)

Russian > English Translate message Turn off for: Russian ×

Задание

LLC "OCL", 40002154241
Rīga, Brīvības 81

Исполнитель: Gatis Bambals
Дата заказа: 05.04.15 10:14
Номер заказа: № 65-003-01
С языка: ENG
На язык: UKR
Ссылка на переводимый файл: http://demo.oclanguage.com/file.php?key=1edcad1b48c723d7b670580579f85c2d
Срок сдачи: 28.02.2015 11:00:00
Отправить на адрес: admin@admin.ua
Заказ отправил (а): Admin Admin
Заказ получил: Gatis Bambals

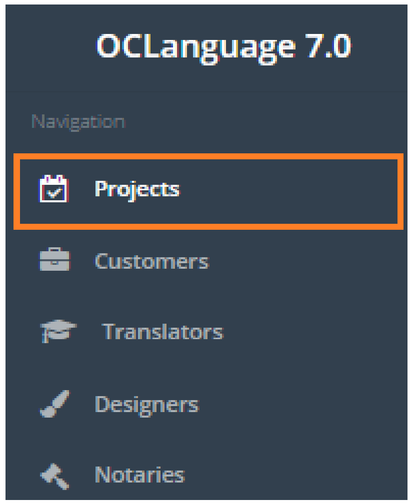
Click here to Reply or Forward

7.15. How to send PO to vendor

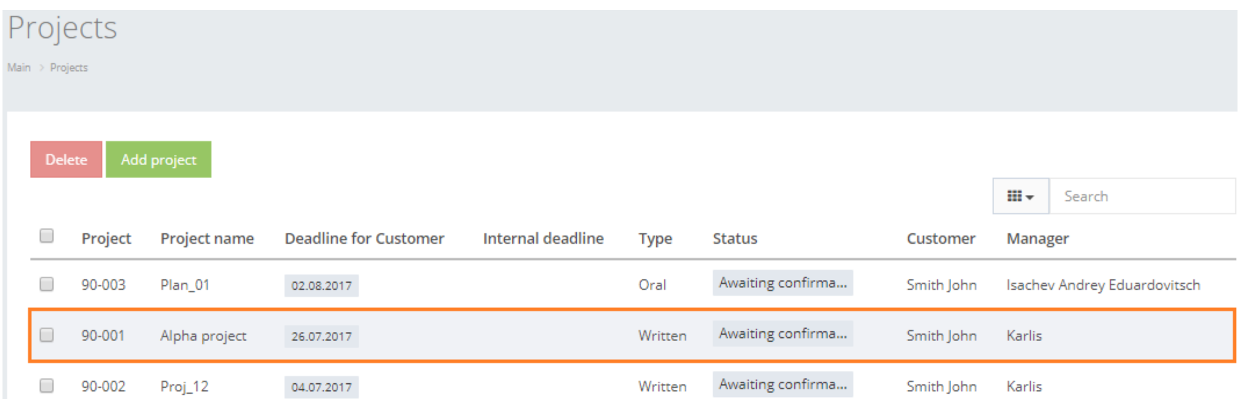
7.15.1. Send from project management window

The system allows the user to issue Purchase Order (PO) document and send it to the vendor automatically. Take following steps to process the PO document:

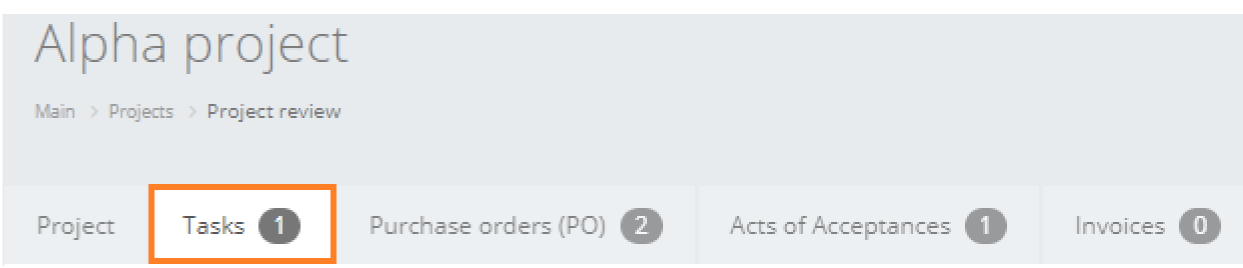
1. Under the main menu click “Projects”.



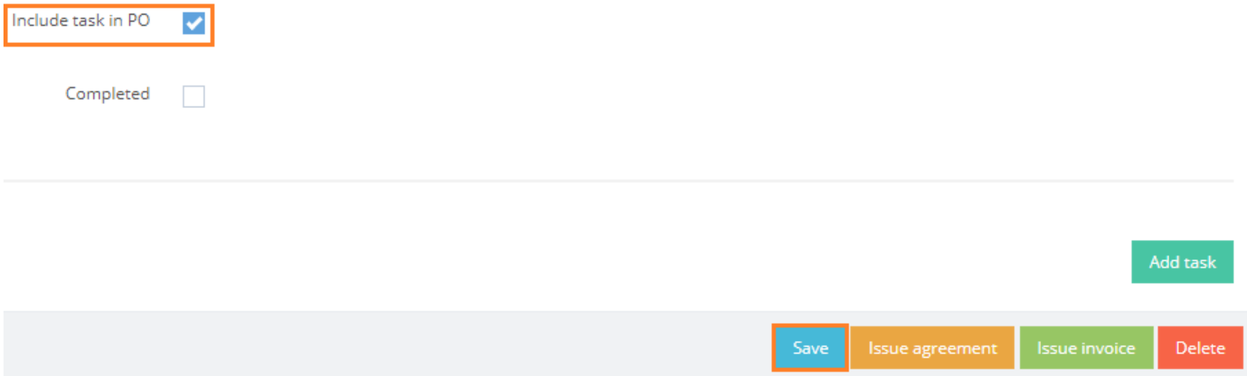
2. Click the project you want to issue PO for.



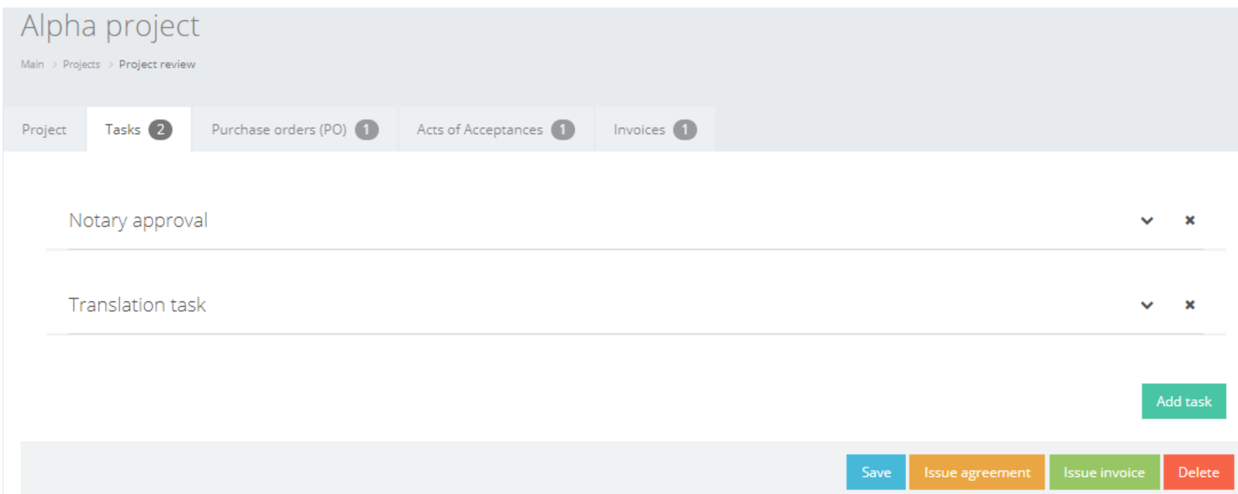
3. Click tab “Tasks” to open the Task window.



4. To issue PO for this task check the box “Include task in PO”. Click “Save”.

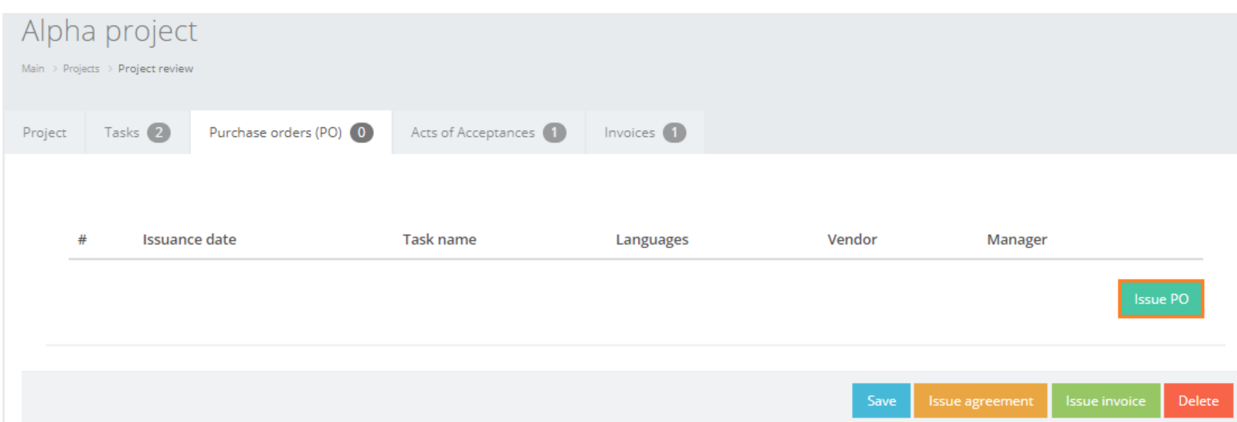


5. In “Tasks” sheet you can view all data about the actual tasks and see, whether particular task is included in PO.

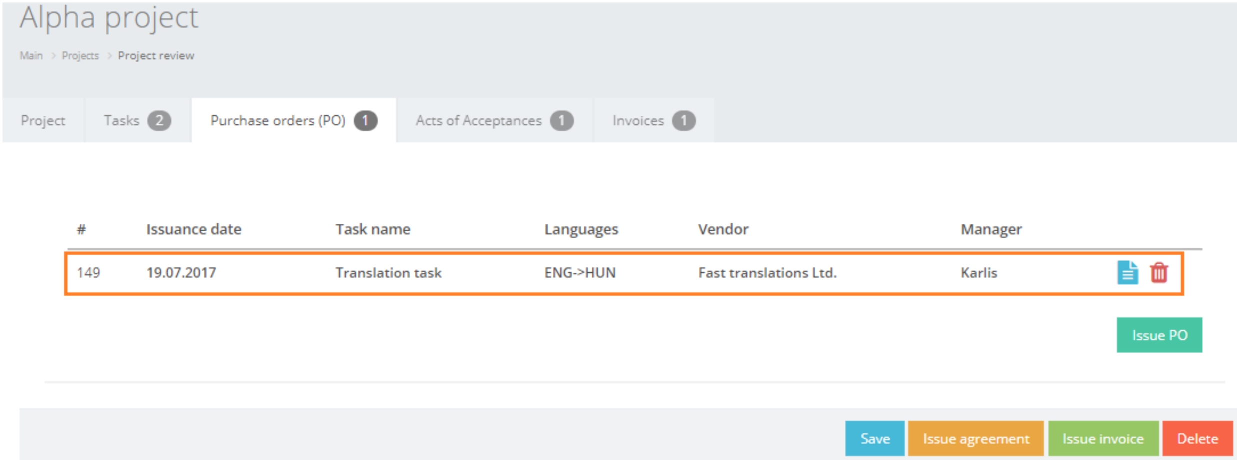


6. To create PO click sheet “Purchase orders (PO)”.

7. Click “Issue PO”.



8. The system interface will be automatically reloaded and you will see a new PO generated.



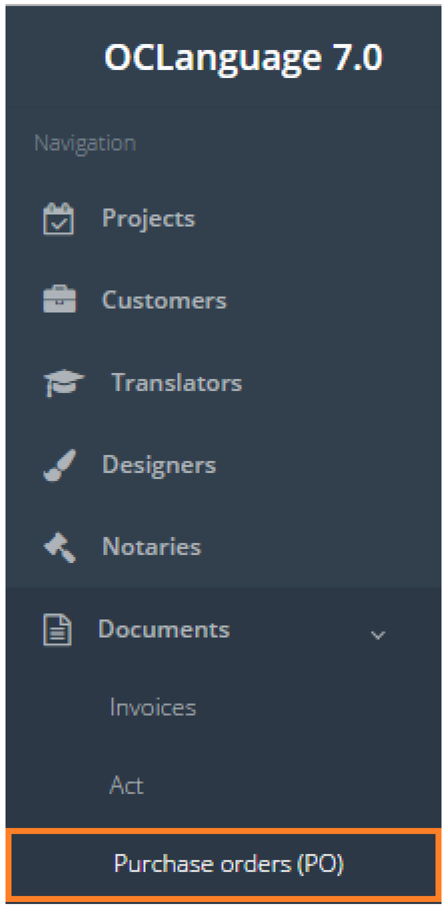
9. Click () to send PO to the vendor.

! Please note that the system will send PO to the vendor's e-mail address each time, when the user checks the box "Send Purchase Order (PO) to vendor", click "Save" in task data and clicks "Issue PO" under "Purchase orders (PO) tab. By default, when the task view window is opened the box "Send Purchase Order (PO) to vendor" is unchecked and no POs are sent by the system.

7.15.2. Send from "Purchase orders (PO)" database view

In order to send a Purchase order from "Purchase orders (PO)" database view, take the following steps:

1. Browse "Documents -> Purchase orders (PO)".

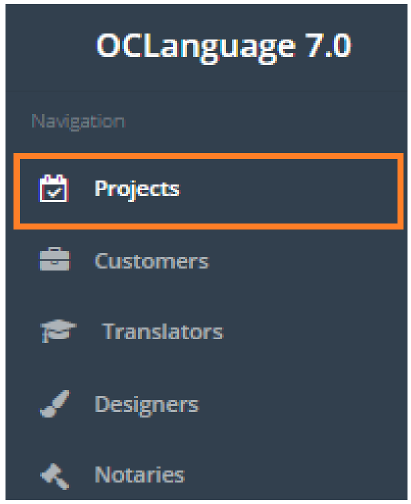


2. Click () to send an act to the particular vendor's e-mail address.

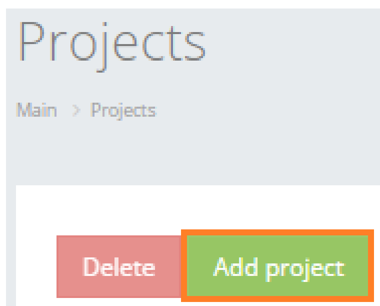
7.16. How to add a new oral translation project

To create a new oral translation project do the following steps:

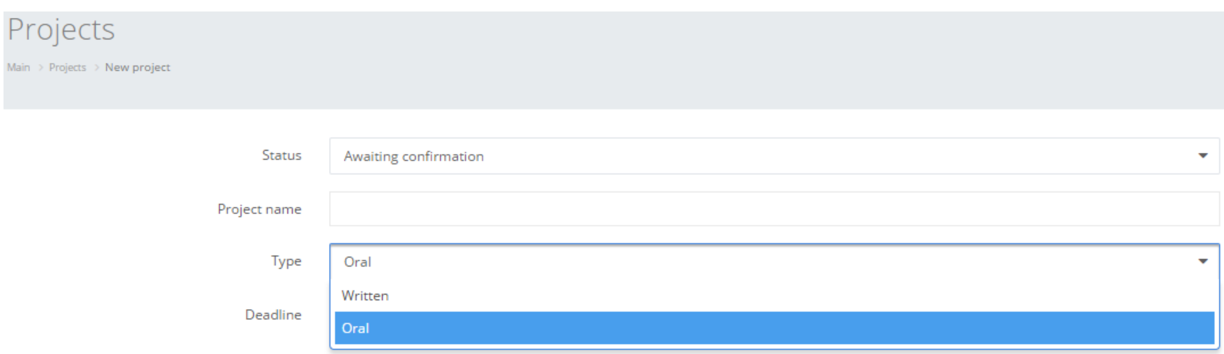
1. Under the main menu click “Projects”.



Click “Add project”.



Choose the translation project type “Oral” and fill in the project data.



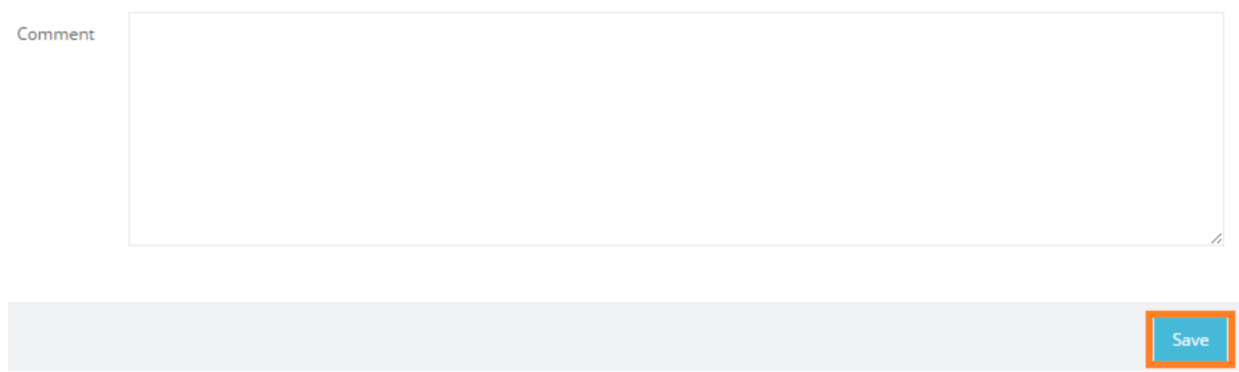
All fields from the project registration window are revealed in the table below.

Field	Description
Status	Project can be in one of below stated statuses: • Awaiting confirmation

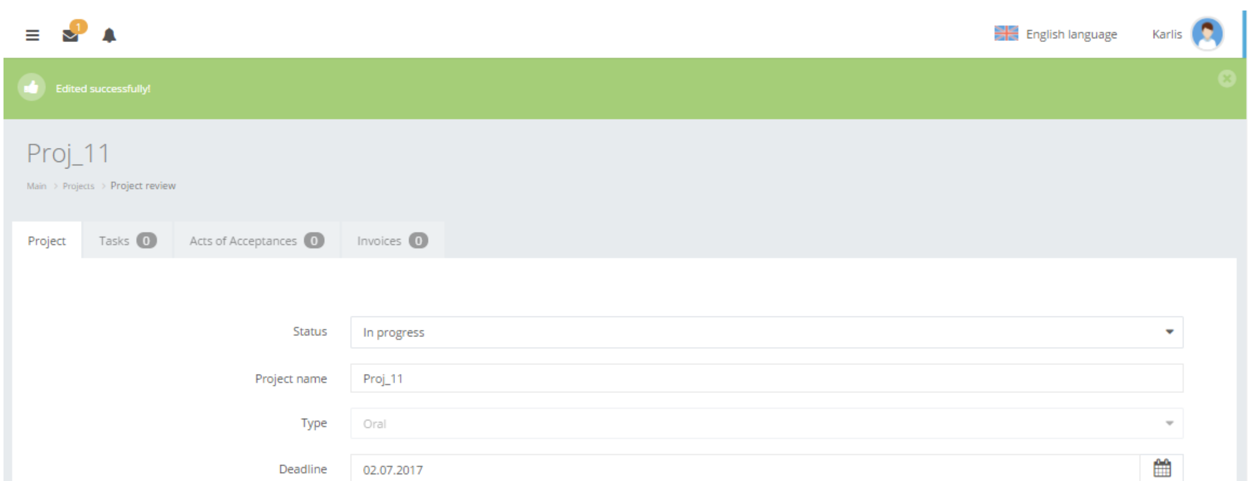
	• In progress • Issued invoice • Paid • Cancelled • Delivered • Evaluating • Finished • Achieved. ! All project statuses are set up manually. None of them are changes automatically. Which means user should maintain correct project status by himself.
Project name	Project name
Type	Oral/written translation project
Deadline	General deadline of project submission to the Customer
Customer's confirmation	Check the box, if the Customer has confirmed the translation
Translation performed in accordance with requests	Check the box to approve the statement above. Relevant, if the Customer sets up specific requirements that have to be met
Customer	Specify the Customer name
Manager	Specify the manager name
Translation type	Specify the oral translation type: • Simultaneous • Consecutive • Whisper.
Country	Specify the country where the translation project will take place
Address	Specify the address, where the translation project will take place
Date and time	Specify date and time information of the oral translation
Translation equipment	Specify the project data, that is related to its execution: • Materials (upload documents relevant to oral translation project) • Vendor (vendor name, who is supposed to handle the translation) • Sum (total budget of project).
Budget	Project budget
Advance payment	Amount of advance payment required from the Customer
Discount	Specify discount for particular project
Payment method	Specify the payment method. Check the box, if any of payment methods are relevant to project:

	• Cash • Receipt • Invoice • Free of charge.
Transport expenses	Amount of transport expenses incurred
Accommodation expenses	Amount of accommodation expenses incurred
Comments	Additional comments related to the translation project

3. Click “Save” to finish the creation of a new oral translation project.



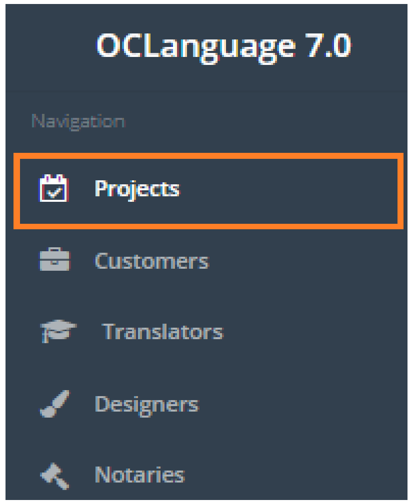
Once the user has saved the project, the system automatically opens the general management window with options of adding new tasks, creating invoices and agreements.



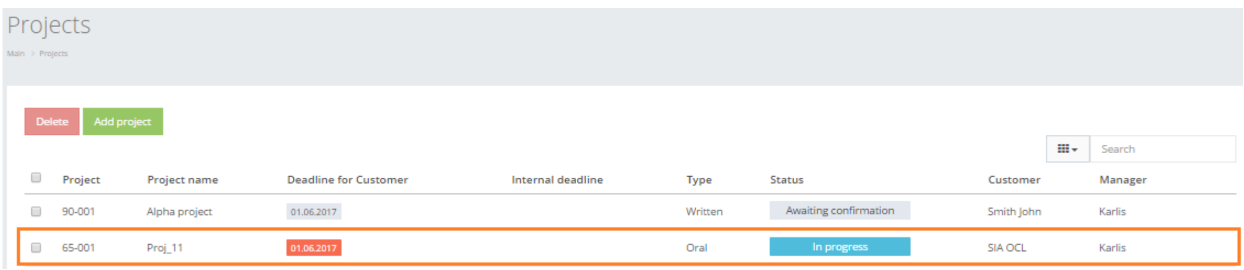
7.17. How to add new task to oral translation project

Take the following steps in order to add a task to the oral translation project:

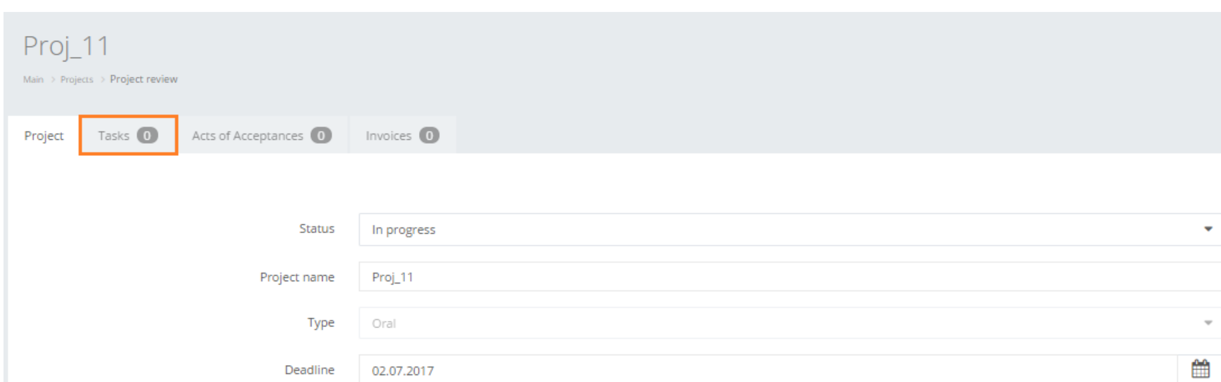
1. Under the main menu click "Projects".



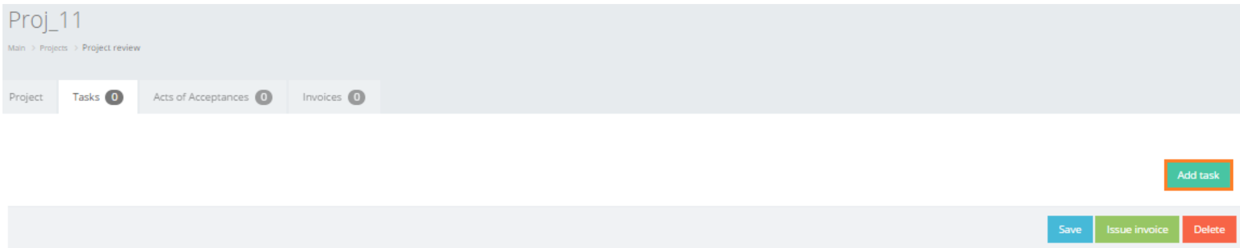
2. Click a particular project.



3. The system will open the general project management window. Click "Tasks".



4. Click “Add task”

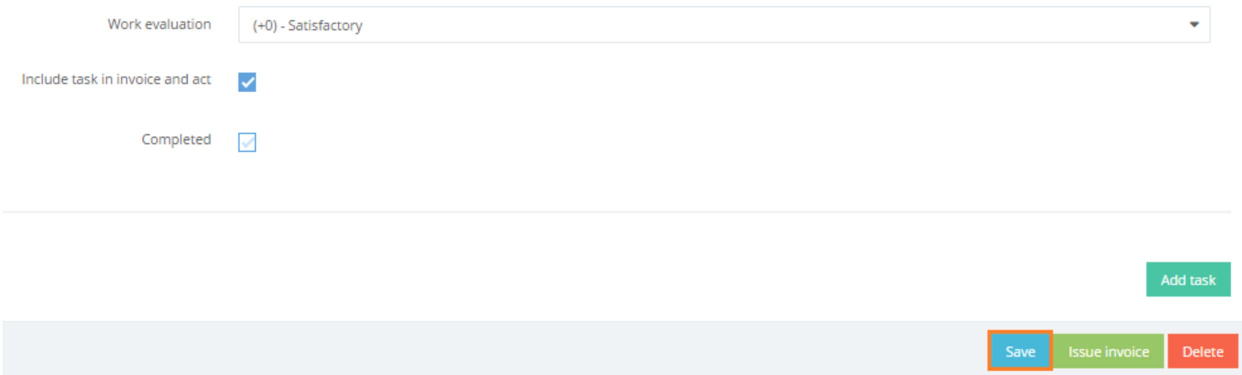


Oral translation project task has the following data that the user either is obliged or is able to save.

Field	**Description**
Task name	Give a name for this particular task ! Important to notice – task name will be visible in the Customer related documents (Act and Invoice).
Date	Specify date information related to oral translation project
Time	Specify time information related to oral translation project
From language	Language, from which the translation will be done
Into language	Language into which the translation will be done
Vendor	Choose any vendor available from the list (the system reveals all vendors that are available and are providing translation of the specific language pair)
Urgency	Specify, if the task is urgent or not (choose between 2 options: regular or urgent).
Translation type	Choose either of supplied options describing the translation specifics: • Technical • Legal • Economics • Medicine • Customs • Science • Personal • Other.

	! Please keep the data updated to allow the system to collect statistics about translation field (Statistics section).
Hours	Specify the duration of translation in hours.
Budget of task for Customer	Specify the task amount that will be revealed in the invoice for Customer. If the Customer belongs to some predefined pricelist of this service, the system will automatically calculate the payment amount to the Customer (by using simple formula of multiplying hour quantity with price/hour). User can choose from available pricelists. After the pricelist is chosen the user can either accept calculated price or revise it.
Payment to vendor	Specify the payment amount to the vendor.
Confirmation	Check the box, if the Customer has confirmed the pricing offer
Full amount paid to vendor	Check the box, if full amount of task budget was paid to the vendor
Information for vendor	Provide specific information related to translation task.
Work evaluation	
Include task in invoice and act	Check the box, if you want to include this task in invoice and act. Once these changes are saved, the system will automatically include it into the invoice and act. Every task equals to a line in the invoice or act.
Completed	Check the box, if the task is completed (submitted to the Customer).

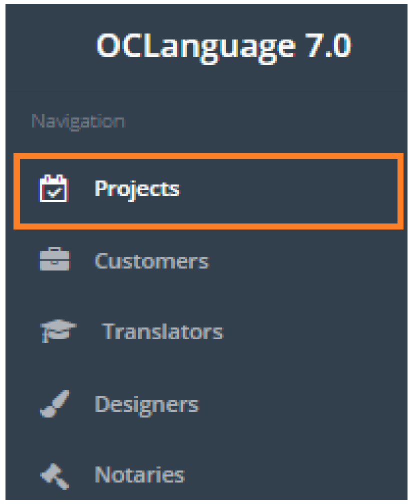
6. Click “Save”.



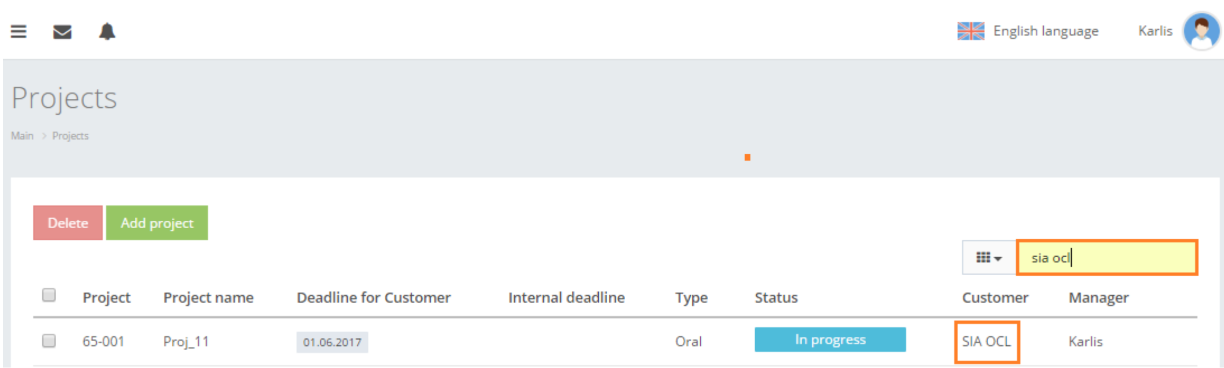
Invoices, Acts and Agreements for oral project are created according to same procedures as with managing written translation project.

7.18. Project table

In order to browse project data click “Projects” on OCLanguage management panel.



In project table the user can filter the data by using Search option – type in letters or digits to filter projects.

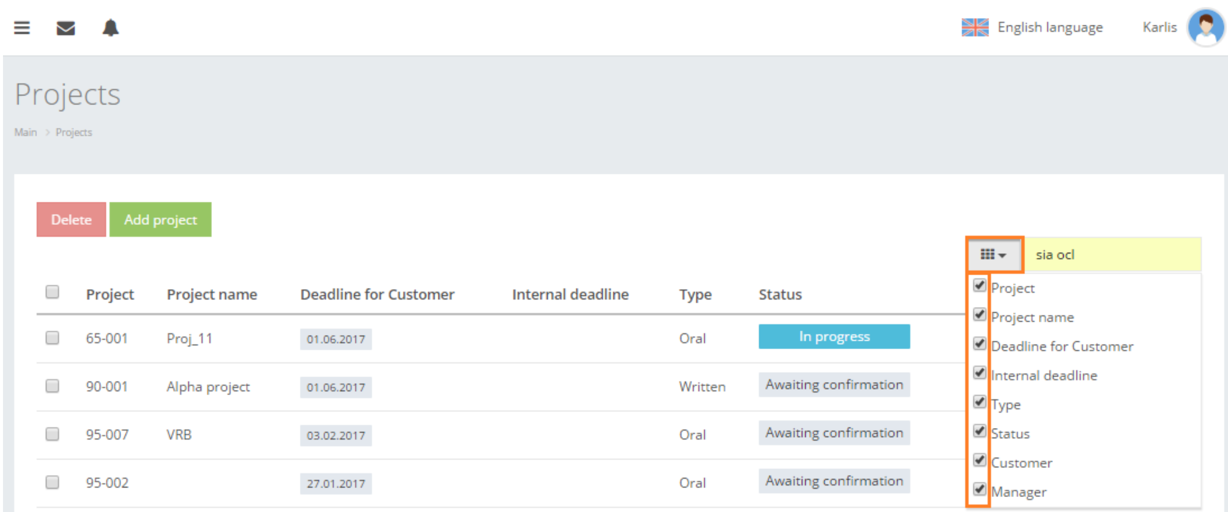


Project table is very flexible in terms of tailoring the selected data according to the translation agency needs. Any column can be removed or edited up to translation agency request to developers of OCLanguage.

Project table consists of the following columns.

Column name	**Description**
Project	Project number
Project name	Project name
Deadline for Customer	General deadline of the project (for the Customer)
Internal deadline	Project deadline (for the translation agency)
Type	Translation project type – written/oral
Status	Project status (maintained in general project data)
Customer	Customer name
Manager	Project responsible manager name

In order to improve the usability of the project management table, the user can use easily add or remove columns that it needs for working with project management table. The system will memorize users choice and supply the user with selected project table outlook every time, when the user logs in into the system.

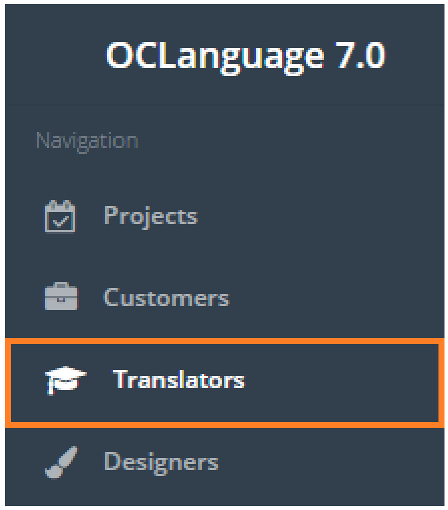


8. Vendor management

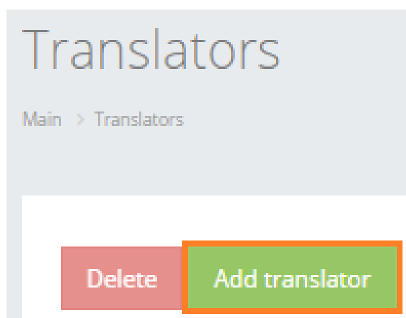
8.1. How to add translator

In order to add a new translator proceed with taking the following steps:

1. In the main menu click “Translators”.



2. Click “Add translator”.



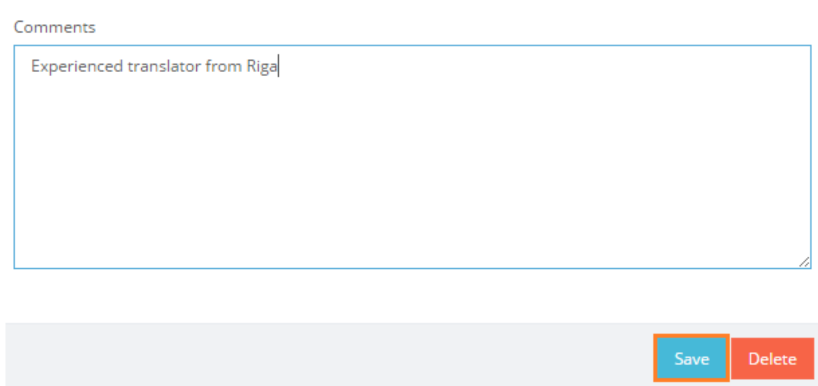
2. Fill in the details in the fields.

Field	Description
Type	Choose either of options: Individual or Legal entity
Name	Person’s name
Surname	Person’s surname
Registration No.	Company’ registration number (relevant to legal entities only)
VAT	Company’ VAT number (relevant to legal entities only)
Gender	Person’s gender
Birthday	Person’s birthday
Country	Specify translator’s country of residence
City	Specify translator’s city of residence

Native language	Translator's native language
Second native language	Translator's second native language
Contact details	Specify translator's contact details. Add several lines, if needed
Available	Check the box, if this translator is available for handling translation projects. ! Please maintain actual availability information, because for handling translation tasks the system will bring up only available translators.
Sworn translator	Check the box, if this translator works in your translation agency
Internet access	Check the box, if this translator has permanent access to the Internet
Fast translations	Check the box, if this translator is able to provide fast translations
Available for over-the-phone interpreting	Check the box, if this translator is able to address over-the-phone interpreting
Consecutive interpreting	Check the box, if this translator is able to address consecutive interpreting
Simultaneous interpreting	Check the box, if this translator is able to address simultaneous interpreting
Performs editing	Check the box, if this translator is able to perform proofreading
Page standard	Specify both standard, according to which vendor works with. • Words on page • Symbols on page. For instance, if vendor's rate of translation from English into Russian is 10 $ and the Customer has ordered 7,200 symbols with spaces, then the system automatically will suggest honorarium amount 40$/task.
Self employed	Check the box, if this translator is a freelancer
Languages	Specify which language pairs the translator is able to do translation with. Click "Add" to create a new record of translation type (oral/written) and language pair. Click "Prices" to add price for translation and translator services.
Other service	Specify other services, that the translator is capable with providing by filling following fields: • Language • Type of service (Selection/Literary editing/Validation/Layout/Proofreading)

	• Measurement (Unit/Word/Page (1,800 ch. with spaces)/Page (250 words)/Page (A4)/Hour) • Price and Currency.
Knowledge evaluation	Evaluate knowledge level (put mark). ! Please note that every translation agency sets its own evaluation standard (for example, mark from 1 to 10 or A to F).
Pages per day	Specify the maximum pages per day that the translator can perform
Experience (years)	Specify translator's experience in years
Fields of expertise	Check fields of expertise, that the translator is familiar with.
Programs	Check the programs that the translator is working with. ! Please note that the content of programs list is maintained by the translation agency (via Board -> Programs)
Translator's documents	Upload translator's documents (resume, translation examples, diplomas etc.)
Terms of payment	Quantity of credit days
Requisites	Save translator requisites data ! Please note that the content of requisites options is maintained by the translation agency (via Board -> Payment methods)
Priority branch	Priority branch that the translators prefers to work with
Comments	Additional information about the translator

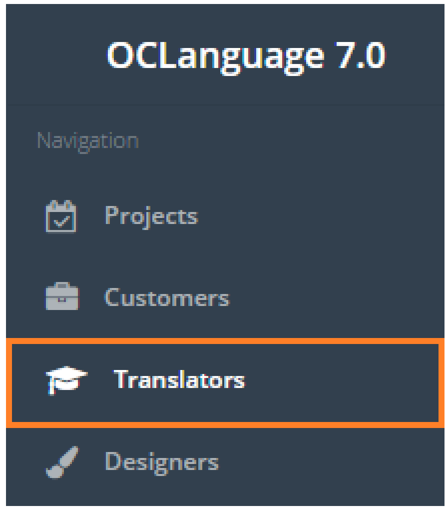
3. Click "Save". The system will save a new record in the translators' table.



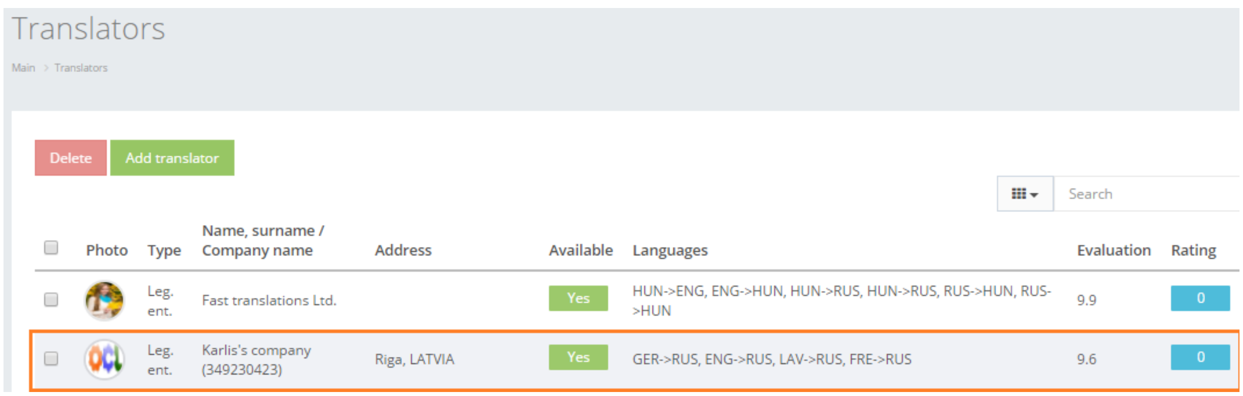
8.2. How to edit translator's data

In order to edit translator's data proceed with taking the following steps:

1. In the main menu click "Translators".



2. The system will open translators' section. Click the translator, whose data you want to review.



3. Edit translator's data.

! Please note - some of fields, that are not visible while translator's creation, become available in translator's table and translator's data review window.

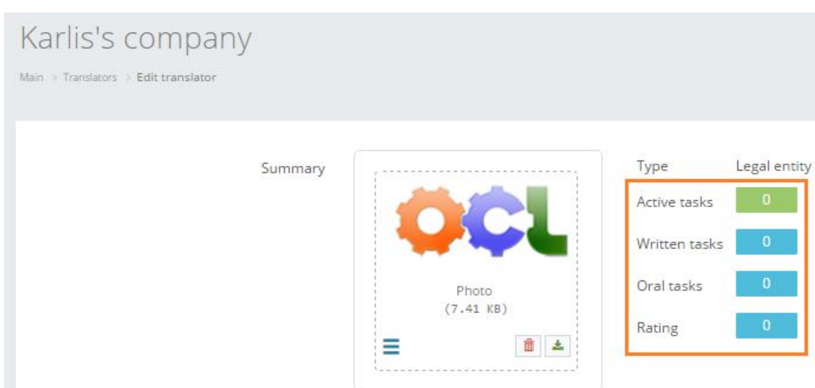
Field	**Description**
Type	Choose either of options: Individual or Legal entity
Name	Person's name
Surname	Person's surname
Registration No.	Company' registration number (relevant to legal entities only)
VAT	Company' VAT number (relevant to legal entities only)
Gender	Person's gender

Birthday	Person's birthday
Country	Specify translator's country of residence
City	Specify translator's city of residence
Native language	Translator's native language
Second native language	Translator's second native language
Contact details	Specify translator's contact details. Add several lines, if needed
Available	Check the box, if this translator is available for handling translation projects. ! Please maintain actual availability information, because for handling translation tasks the system will bring up only available translators.
Sworn translator	Check the box, if this translator works in your translation agency
Internet access	Check the box, if this translator has permanent access to the Internet
Fast translations	Check the box, if this translator is able to provide fast translations
Available for over-the-phone interpreting	Check the box, if this translator is able to address over-the-phone interpreting
Consecutive interpreting	Check the box, if this translator is able to address consecutive interpreting
Simultaneous interpreting	Check the box, if this translator is able to address simultaneous interpreting
Performs editing	Check the box, if this translator is able to perform proofreading
Self employed	Check the box, if this translator is a freelancer
Languages	Specify, which language pairs translator is able to do translation with. Click "Add" to create a new record of translation type (oral/written) and language pair. Click "Prices" to add price for translation and proofreading services.
Other service	Specify other services, that translator is capable with providing by filling following fields: • Language • Type of service (Selection/Literary editing/Validation/Layout/Proofreading) • Measurement (Unit/Word/Page (1,800 ch. with spaces)/Page (250 words)/Page (A4)/Hour) • Price and Currency.
Knowledge evaluation	Evaluate knowledge level (put mark). ! Please note, that every translation agency sets its own evaluation standard (for example, mark from 1 to 10 or A to F).

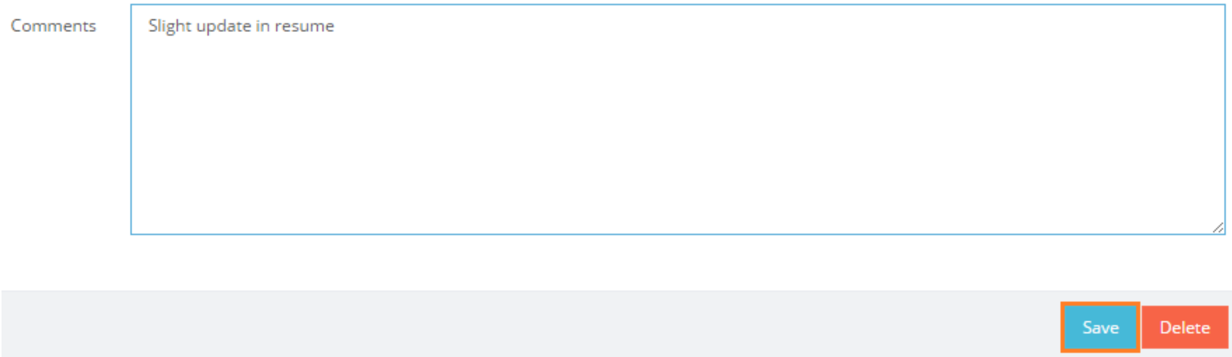
Pages per day	Specify the maximum pages per day that translator can perform
Experience (years)	Specify translator's experience in years
Fields of expertise	Check fields of expertise that the translator is familiar with.
Programs	Check the programs that the translator is working with. ! Please note that the content of programs list is maintained by the translation agency (via Board -> Programs)
Translator's documents	Upload translator's documents (resume, translation examples, diplomas etc.)
Terms of payment	Quantity of credit days
Requisites	Save translator requisites data ! Please note that the content of requisites options is maintained by the translation agency (via Board -> Payment methods)
Priority branch	Priority branch that the translators prefers to work with
Comments	Additional information about the translator

! Please, note that after a new translator is created, when the user opens translator's data review window, the system reveals statistics about the translator, described in the table below.

Parameter	Description
Active tasks	Quantity of tasks, that are being handled by the translator now
Written tasks	Quantity of written tasks done by the translator
Oral tasks	Quantity of oral tasks done by the translator
Rating	Rating of the translator among all vendors



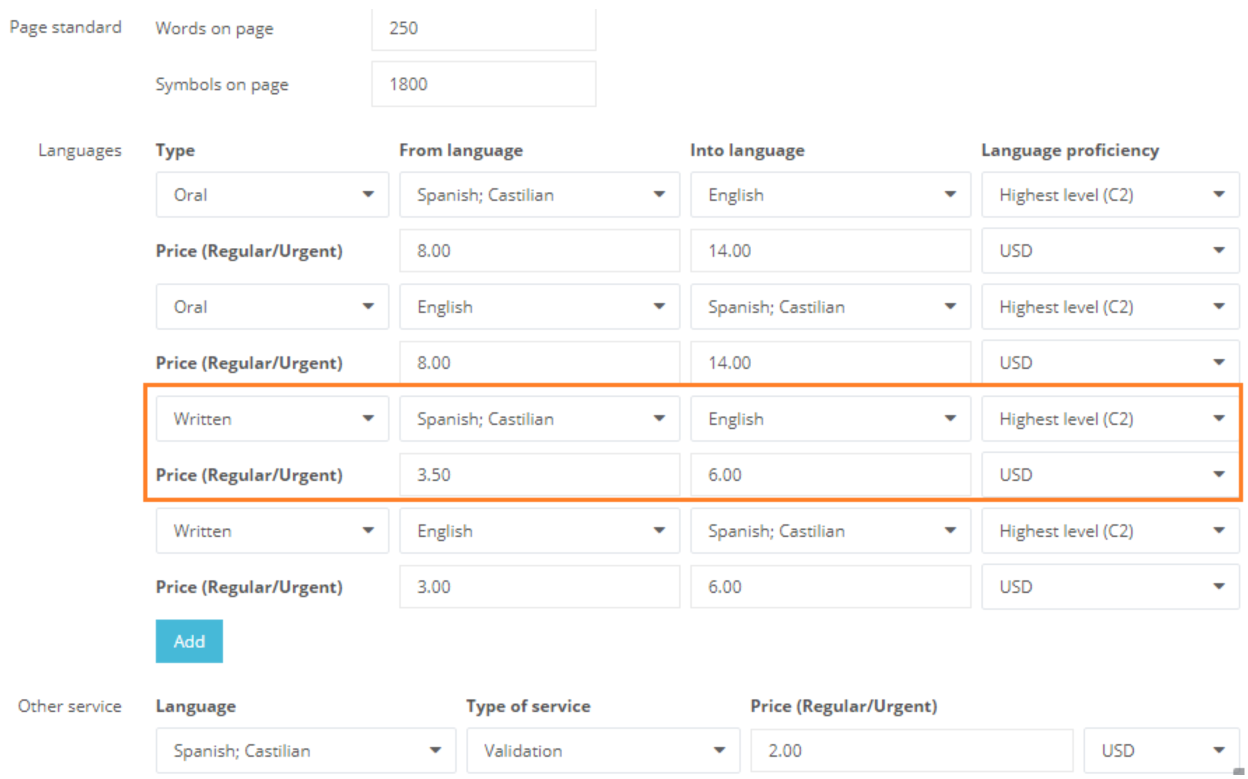
4. Click "Save". The system will save a new changed translator's card.


Comments
Slight update in resume
Save
Delete

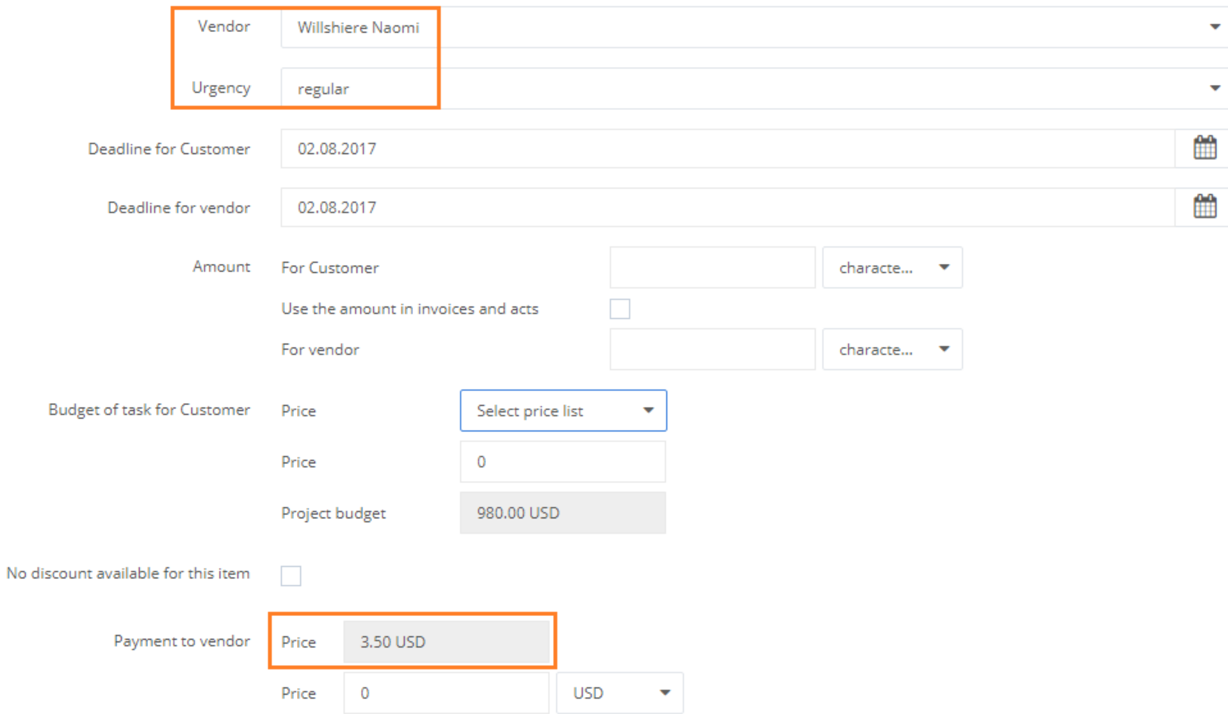
8.3. How to use autonomic payment rates for translator

OCLanguage automatically calculates payment amount to the vendor. In order to use this feature the user should do the following:

1. Make sure that in the translator's data the manager has saved regular and urgent translation/translator services prices. See the information of translator's data maintenance in document "8.1.2. How to edit translator's data".



2. Simply create a new task for the service, language pair and urgency level that the translator is able to handle. The system will automatically count the payment amount to the vendor. The total price is editable. See the information of how to create a new task in user manual "7.3. How to add task".



! Please note that in order to benefit from autonomic calculation of amount of honorarium to the vendor, the following data has to coincide in translator’s data and task data:

- Service type (translation/translator service/sworn translator)
- Language pair
- Urgency status (regular/urgent).

8.4. Translators rating and feedback

In order to sort existing translators per knowledge and service level, the following system features have been designed:

1. Evaluation (knowledge rate set by system user)

2. Rating (average grade for translation service with total quantity of tasks in square brackets).

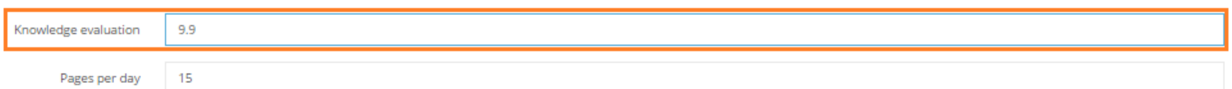
Every feature is set up as separate tool or translators' knowledge measurement.

Below you will see the explanation of logics behind every of three modules.

Knowledge evaluation

According to OCLanguage workflow the translation agency is able to evaluate the knowledge of translator. By using evaluation module system the user is able to set mark that reveals knowledge level of the vendor. Evaluation range is not regulated – each translation agency sets it's own minimum and maximum. For example, one could evaluate translator's knowledge by putting mark from 1 to 10, other from A to F.

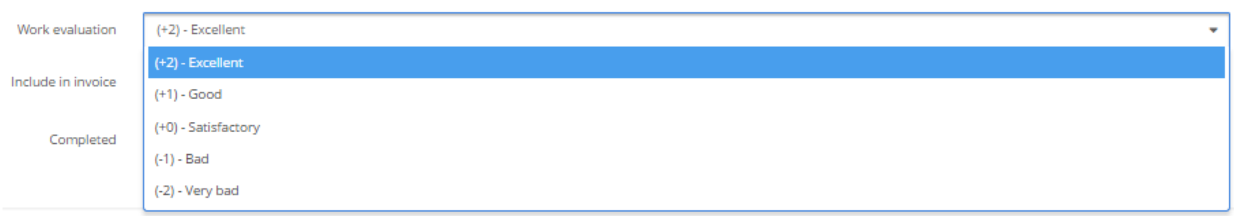
Translator is evaluated only in translator's data window.



Rating

Rating feature allows the system user to rate every task performed by the vendor. The mark range is from –2 to +2.

In order to rate the vendor's work, the system user should open task and in field "Work evaluation" choose one from available options.



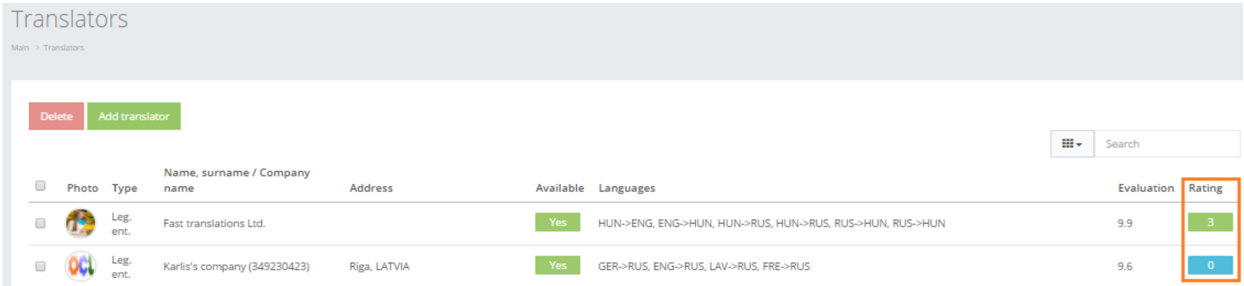
Rating for task can be changed at any time during project management process (right after task has been added to document). This means that initially set up mark could be changed, if needed.

In translators' section there is parameter "Rating", that reveals actual vendor ratings. Also, there are three colors that indicate rating status:

Green – positive rating

Blue – 0 rating

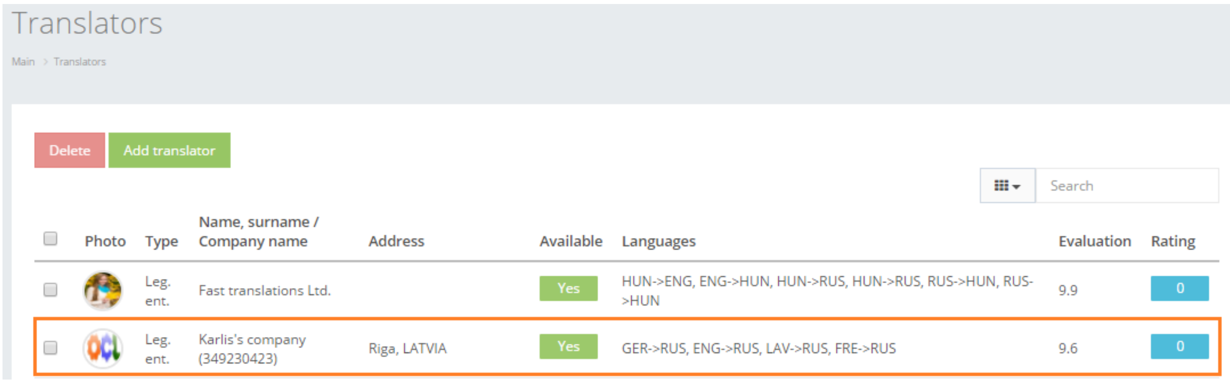
Red – negative ratings


Translators
Main > Translators
Delete
Add translator
Search
Photo
Type
Name, surname / Company name
Address
Available
Languages
Evaluation
Rating
Leg. ent.
Fast translations Ltd.
Yes
HUN->ENG, ENG->HUN, HUN->RUS, HUN->RUS, RUS->HUN, RUS->HUN
9.9
3
Leg. ent.
Karlis's company (349230423)
Riga, LATVIA
Yes
GER->RUS, ENG->RUS, LAV->RUS, FRE->RUS
9.6
0

8.5. Translators statistics

The system gathers statistics about translators' performance while handling tasks. In order to see the statistics about the total volume of translations done by a particular translator the user should take the following steps:

1. Open the translators database and click the translator, whose statistics you want to see.



2. The system will open the translator's overview window, where in "Translation statistics" field the system reveals the following statistics described in the table below.

Parameter	Description
Active tasks	Quantity of tasks, that are being handled by the translator now
Written tasks	Quantity of written tasks done by the translator
Oral tasks	Quantity of oral tasks done by the translator
Rating	Rating of translator among all the vendors

8.6. Translators schedule

Translators schedule was excluded from OCLanguage starting from version 7.0. However, this feature could appear in future versions of OCLanguage software.

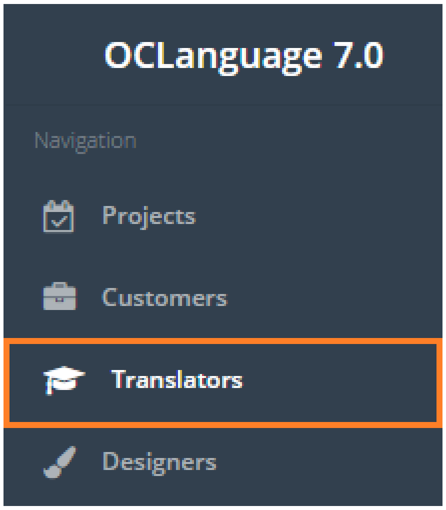
8.7. Translators document management

Use the translators document management module to maintain accurate information about translator's resume, work examples, diplomas etc.

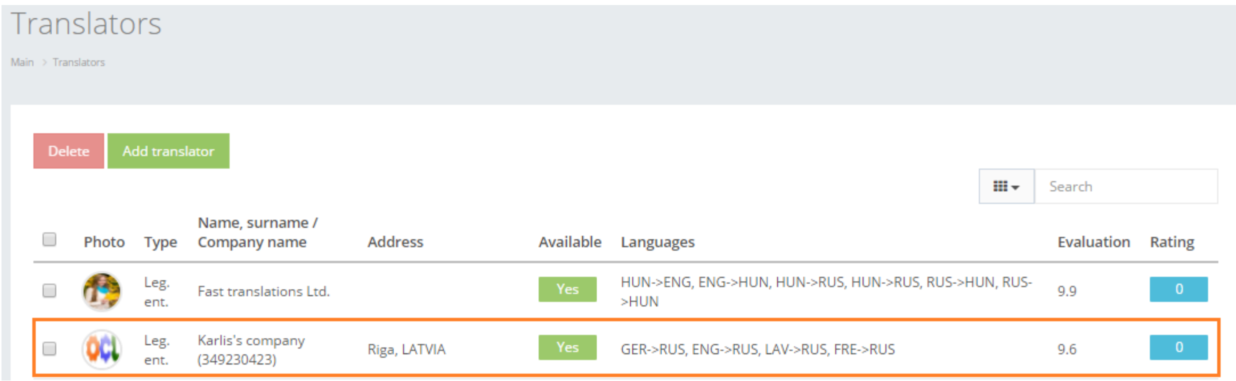
Translator's documents are available only in the translators' overview window.

Below you will see how to add and view the documents related to the translator:

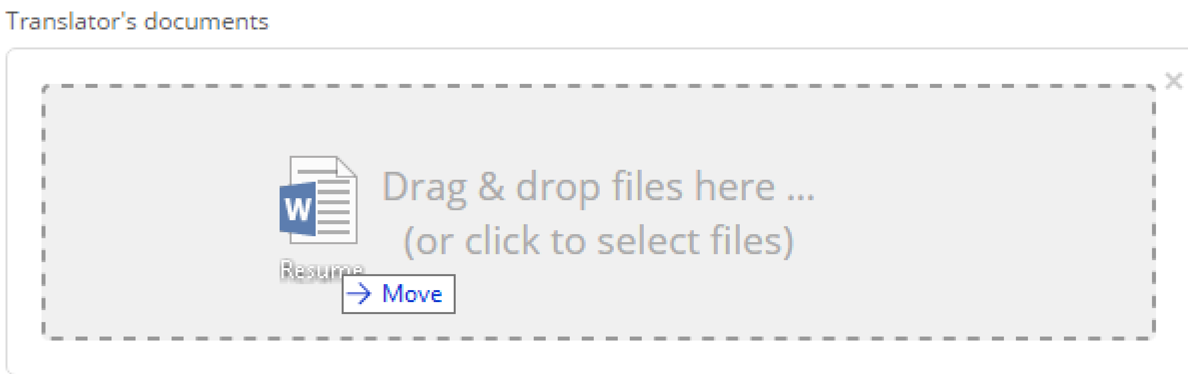
1. In main menu click "Translators".



2. The system will open the translators' database. Click the translator to upload its documents.

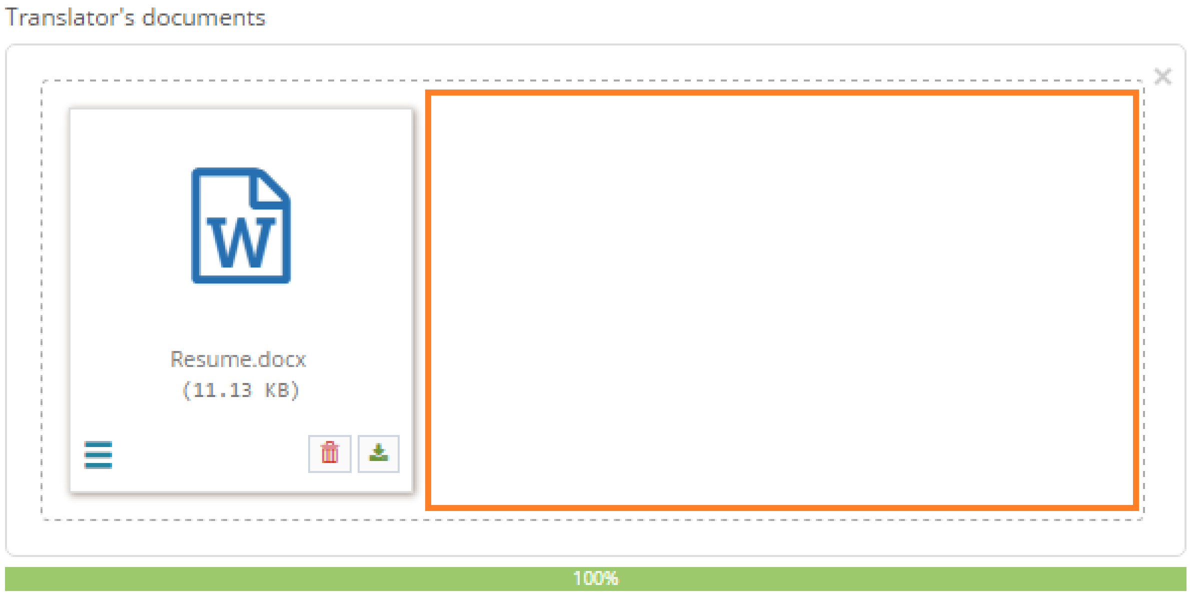


3. The system will open the translator's data overview window. Scroll down until you see "Translator's documents" section. Simply drag and drop the file you want to upload to the translator's business card.



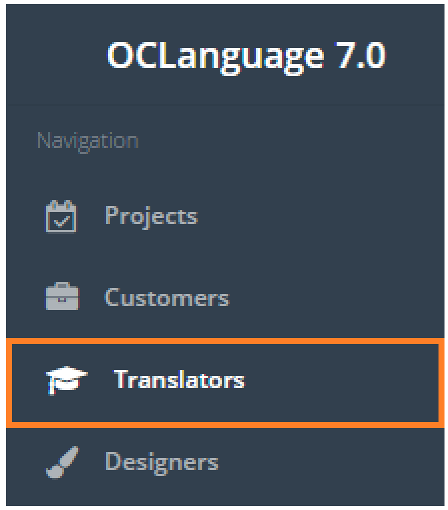
4. The system will save the uploaded document under “Translator’s documents” section.

Other option to upload documents is to click on empty space in the documents upload block.



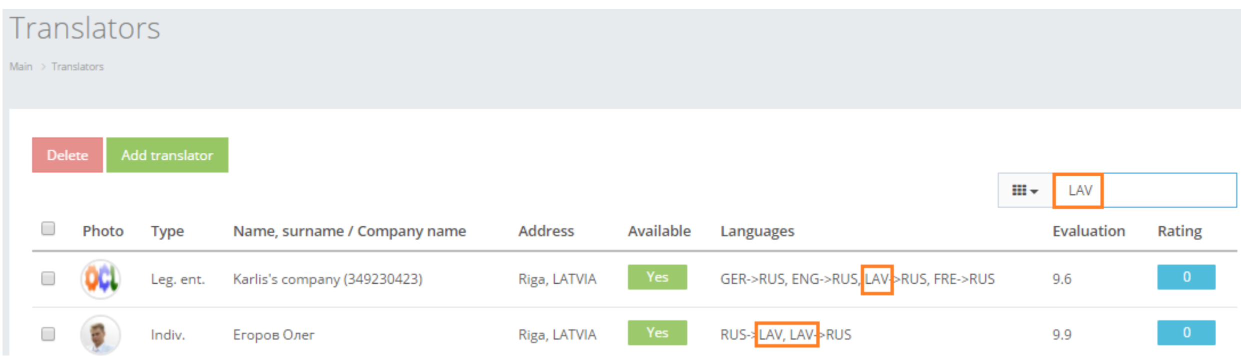
8.8. Translators table

In order to open the Translators database, in the main menu click “Translators”.



User can filter data in the Invoices database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter”.

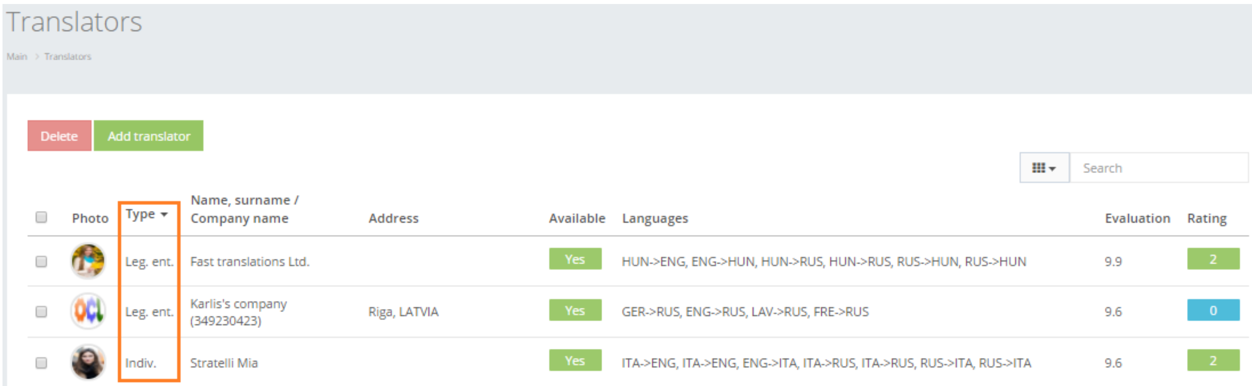


Below you will see a list of parameters (column names) the system searches data for:

- Name, surname / company name
- Languages
- Contact details (for instance, e-mail address, skype name).

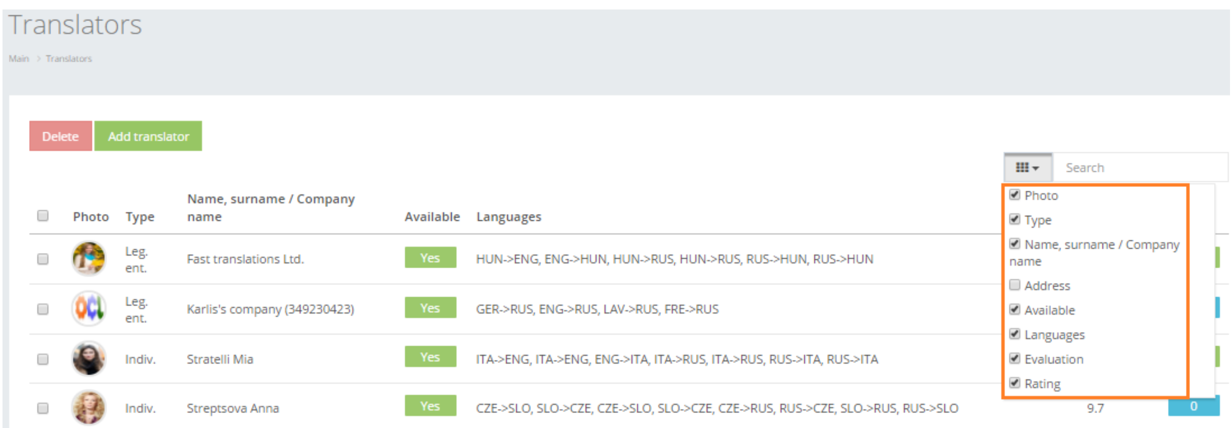
! Please note that the data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the Translators table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the Translators database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



Translators table consists of the following columns:

Field	**Description**
Photo	Photography of translator
Type	Business type – Individual / Legal entity
Name, surname / company name	Translator's name, surname / company name
Address	Translator's place of residence
Available	Availability information
Languages	Language pairs the translator works with
Evaluation	Evaluation rate
Rating	Tasks rating

8.9. CV of translator

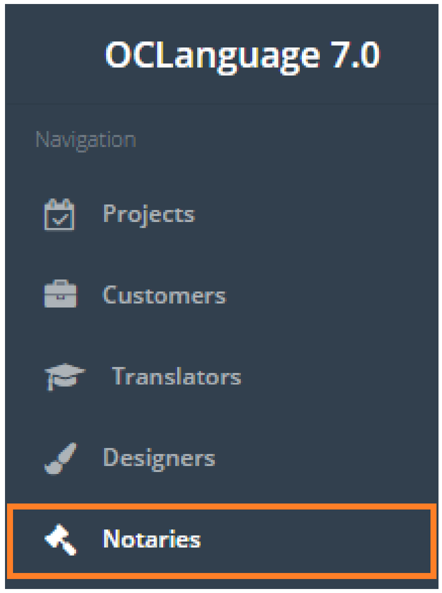
The content of resume conforms to Europass CV standard. The translation agency manager is able to register the translator by himself or our developers can implement existing database from the previous software systems the translation agency used to operate with.

Content of resume is described in document “8.1. How to add translator”.

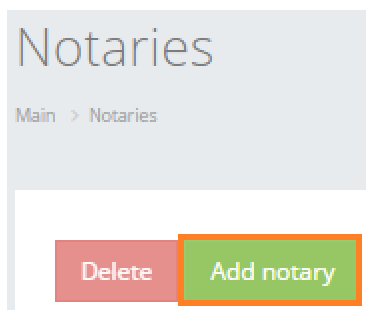
8.10. How to add notary

In order to add a new notary follow the below steps:

1. In main menu click “Notaries”.



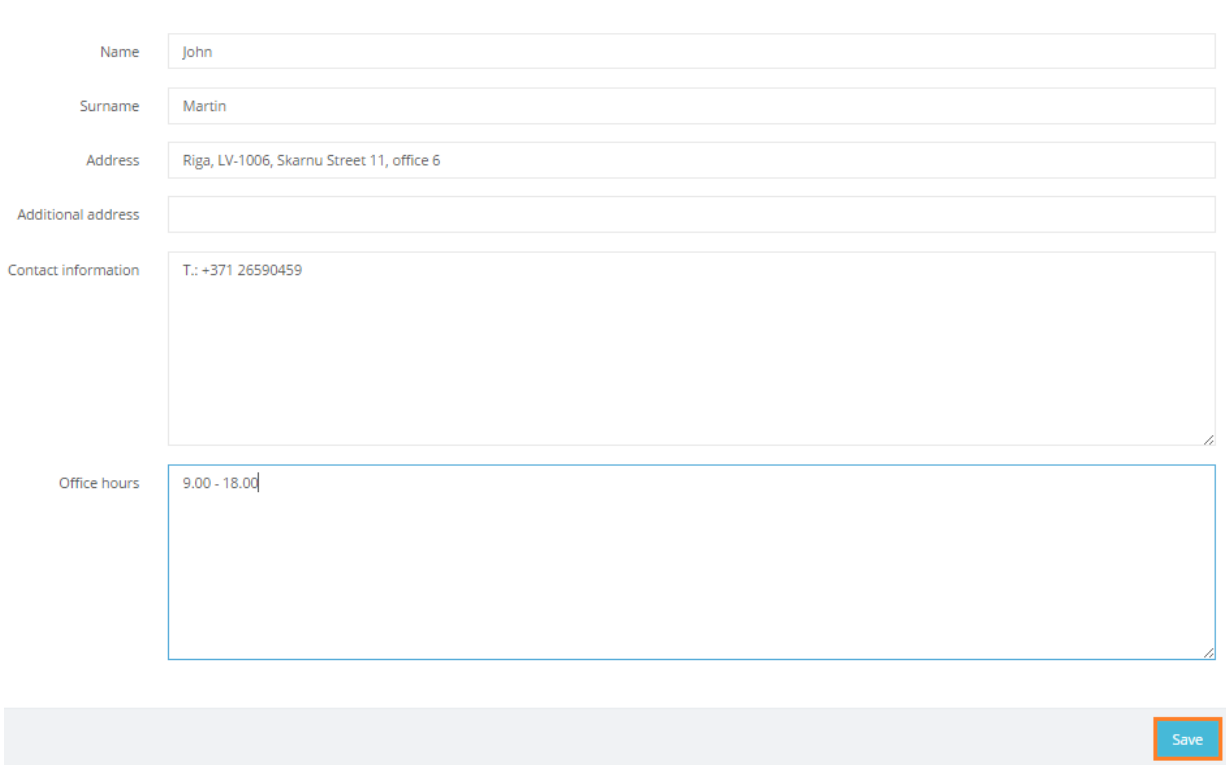
2. Click “Add notary”.



3. Fill in the details in the fields. Obligatory fields are marked with “*”.

Field	**Description**
Name	Notary’s name
Surname	Notary’s surname
Address	Notary’s address
Additional address	Notary’s additional address, if applicable
Contact information	Notary’s contact data
Office hours	Office hours of notary

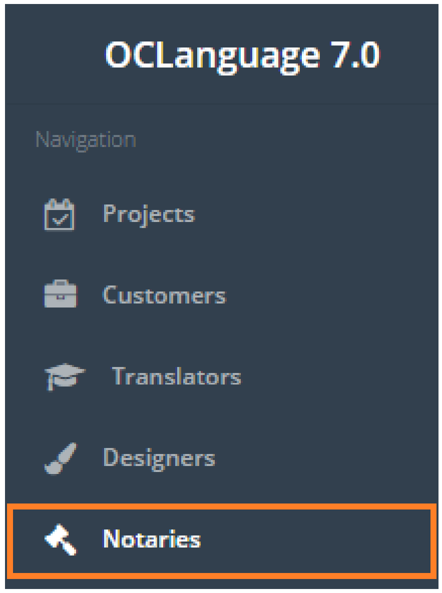
3. Click “Add”. The system will save a new record in the translators’ table.



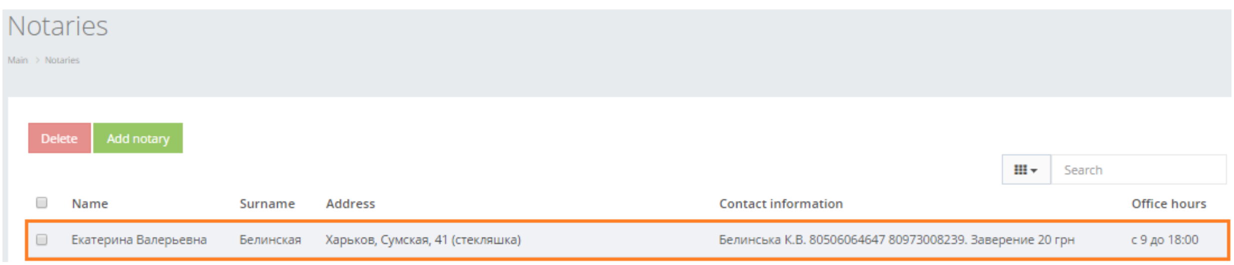
8.11. How to edit notaries' data

In order to edit notary's data follow the below steps:

1. In the main menu click "Notaries"



2. The system will open the notaries' database. Click the notary, whose data you would like to review.



3. Edit the notary's data.

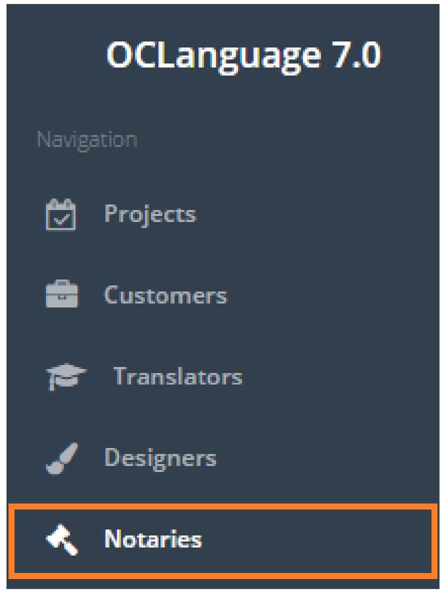
4. Click "Save". The system will save a new changed notary's card.

Name	Екатерина Валерьевна
Surname	Белинская-Орлова
Address	Харьков, Сумская, 41 (стекляшка)
Additional address	
Contact information	Белинська К.В. 80506064647 80973008239. Заверение 20 грн
Office hours	с 9 до 18:00

Save Delete

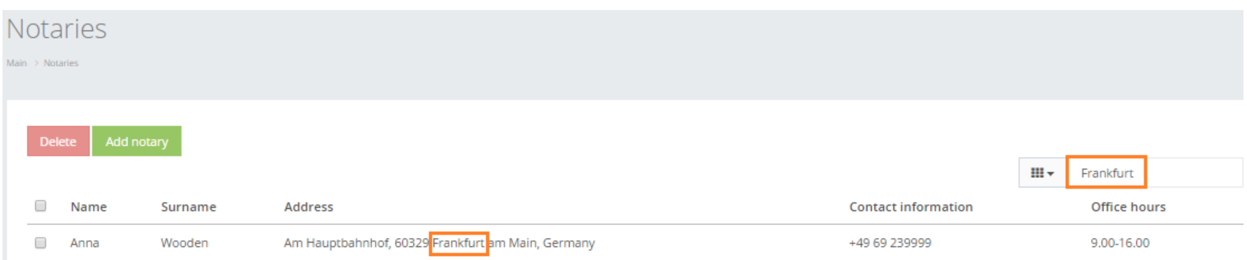
8.12. Notaries table

In order to open the Notaries database, in the main menu click “Notaries”.



User can filter data in Invoices database by using 3 methods:

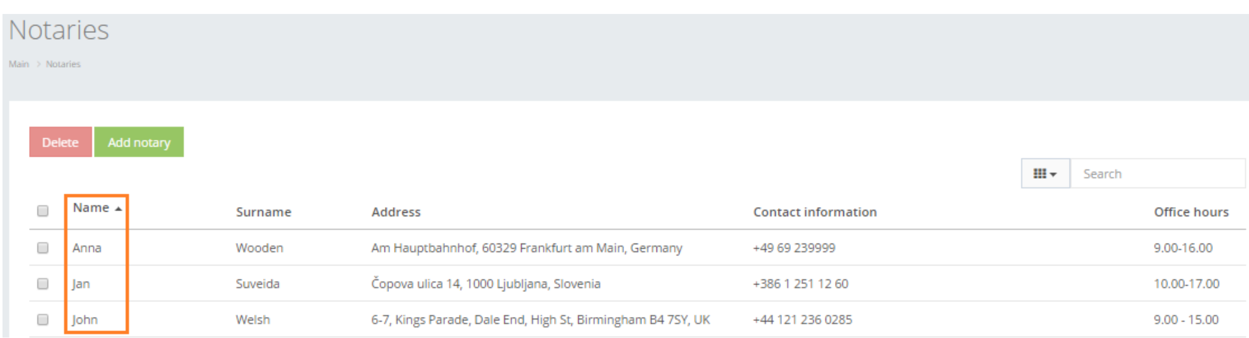
1. Type letters or numbers in “Search” field and click “Enter”



System searches data according to all parameters (columns) in the Notaries database.

! Please note that the data filter can be removed by deleting text in “Search” field and clicking “Enter”.

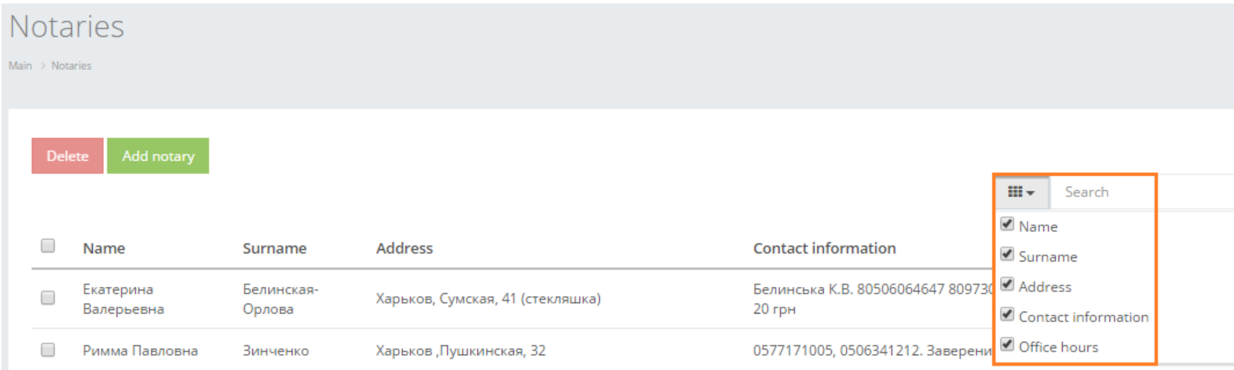
2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select columns that you want (or do not want) to

view in the Notaries database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



Notaries table consists of the following columns:

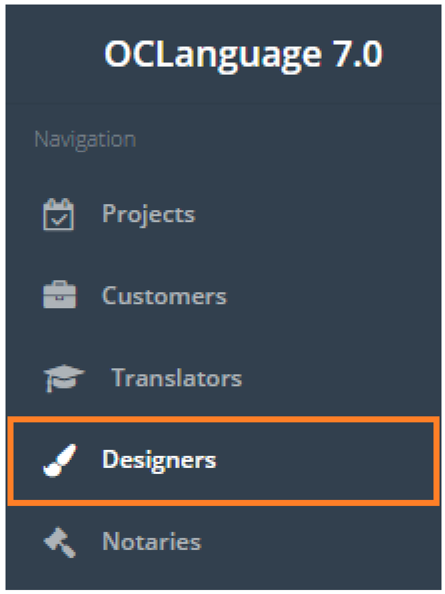
Field	**Description**
Name	Notary’s name
Surname	Notary’s surname
Address	Notary’s residence address
Contact information	Contact information in text form
Office hours	Working hours information

8.13. How to add designer

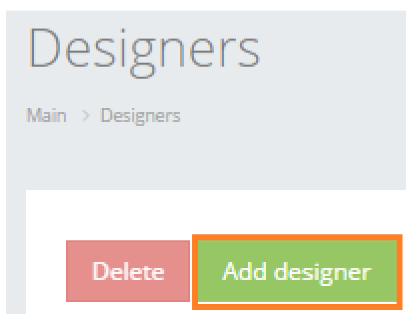
In OCLanguage system a designer is a person, who s responsible for DTP services.

In order to add a new designer follow the below steps:

1. In the main menu click “Designers”



2. Click “Add designer”

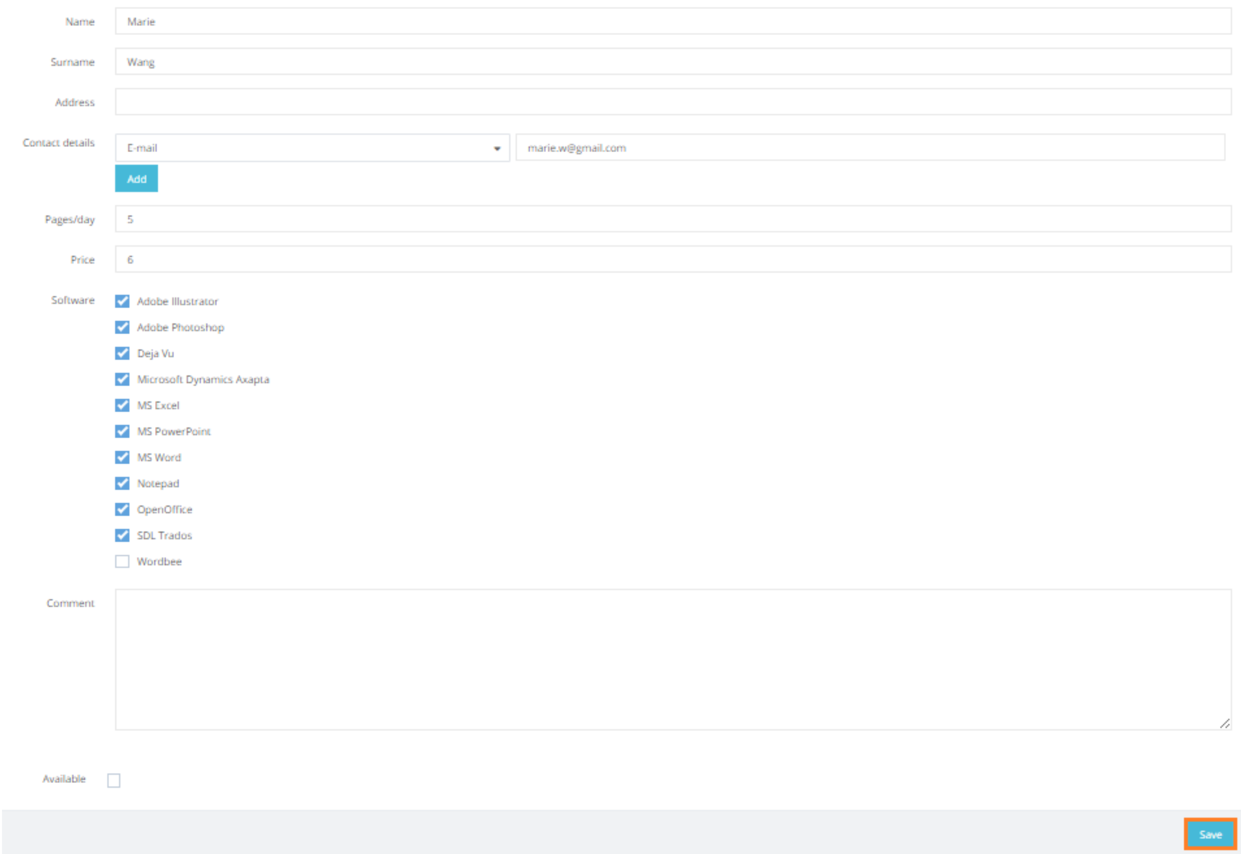


2. Fill in the details in the fields. Obligatory fields are marked with “*”.

Field	**Description**
Name	Designer’s name
Surname	Designer’s surname
Address	Designer’s address
Contact details	Designer’s contact data
Pages/day	Specify, how many pages the designer is able to handle per day
Price	Specify the price per page
Software	Mark all programs that the designer works with. ! Please note, that the programs list is collected from Programs subsection (under Board). The

	translation agency itself maintains actual programs list.
Available	Check availability box, if the designer is available for handling DTP tasks. ! Please maintain actual availability information, because for handling DTP tasks the system will bring up only available designers.
Comments	Leave comments about the particular designer, if needed

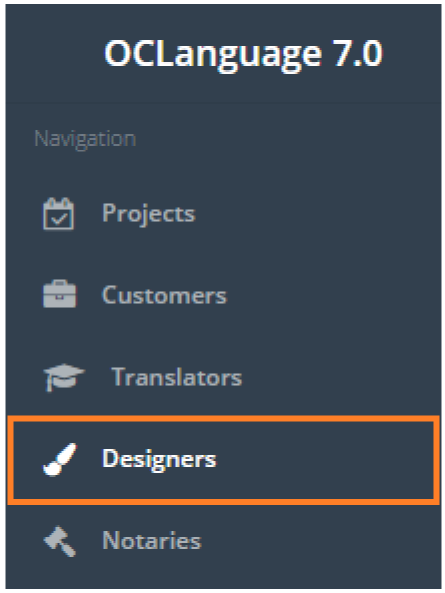
3. Click “Save”. The system will save a new record in the designers’ table.



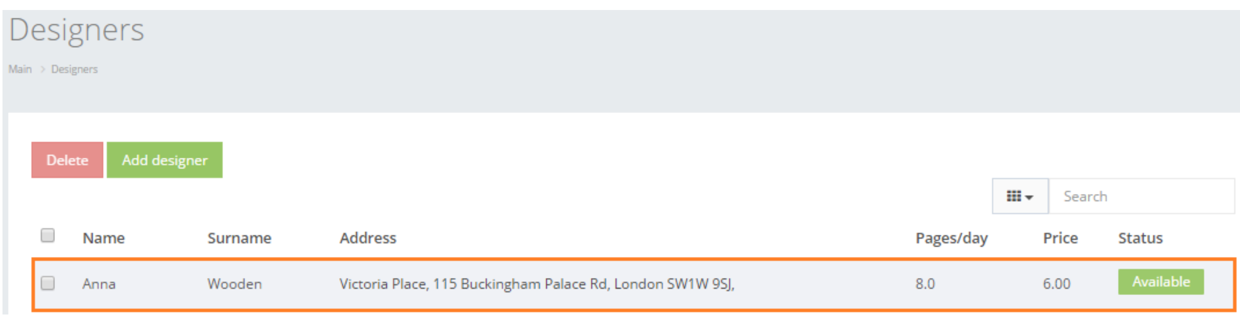
8.14. How to edit designer's data

In order to edit designer's data follow the below steps:

1. In the main menu click "Designers"

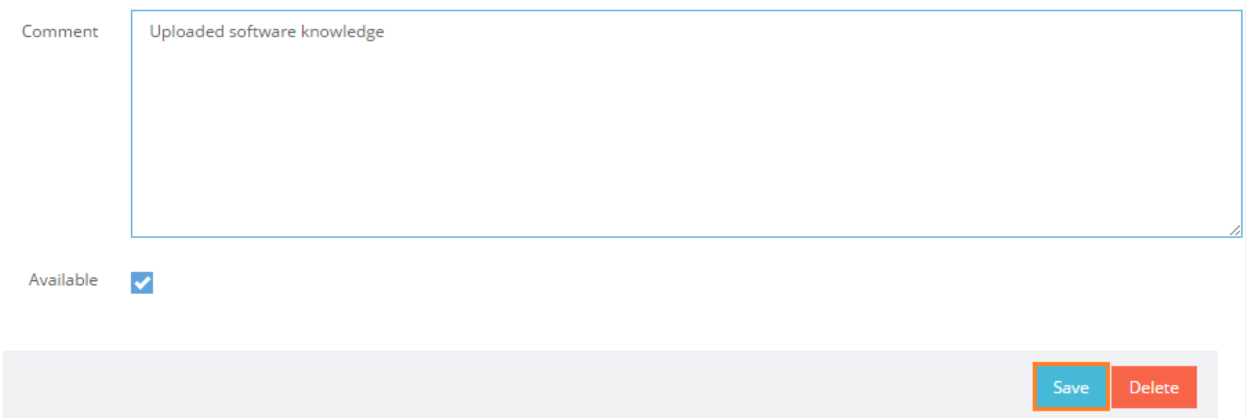


2. The system will open the designers' subsection. Click the designer, whose data you would like to review.



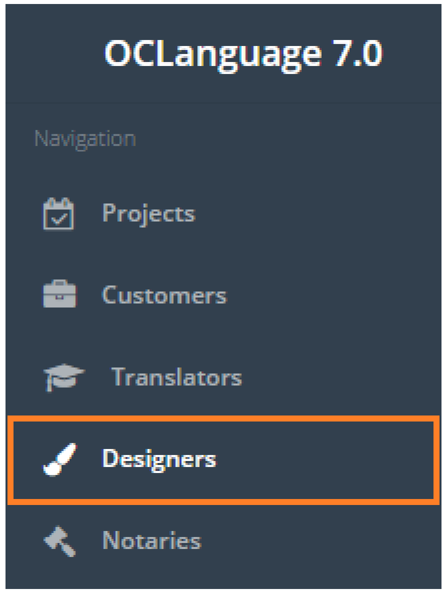
3. Edit the designer's data.

4. Click “Save”. The system will save a new changed designer’s card.

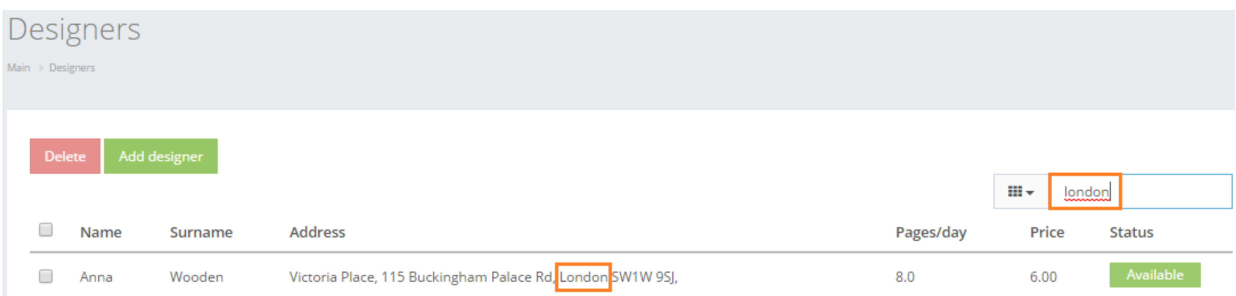


8.15. Designers table

In order to open the Designers database, in the main menu click “Designers”.



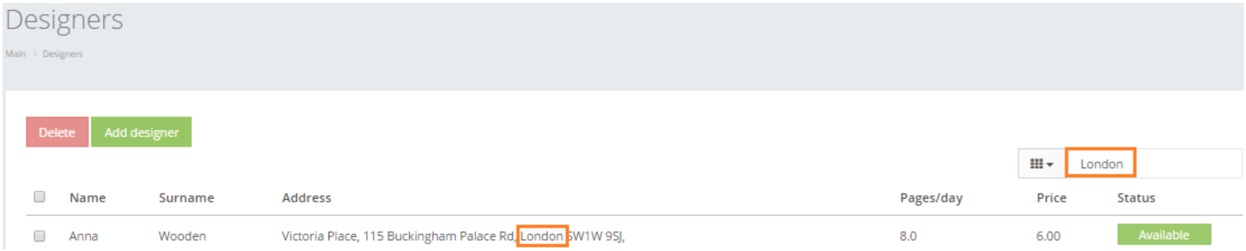
In the designers table the user can filter the data by using Search option – type in letters or digits to filter the designers.



Designers table is very flexible in terms of tailoring the selected data according to the translation agency needs. Any column can be removed or edited up to the translation agency request to developers of OCLanguage.

User can filter data in the Invoices database by using 2 methods:

1. Type letters or numbers in “Search” field and click “Enter”

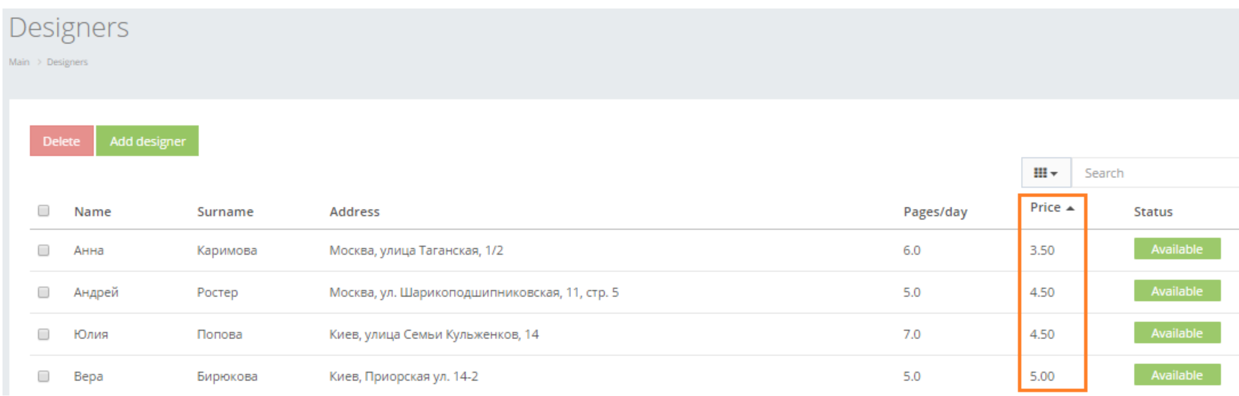


Below you will see a list of parameters (column names) the system searches data for:

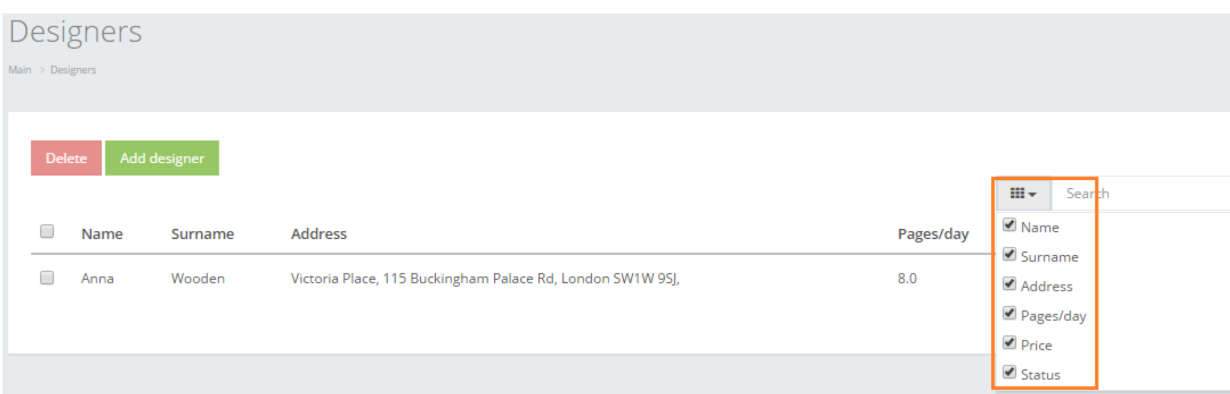
- Name
- Surname
- Address.

! Please note that data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



In order to improve the usability of the project management table, the user can use easily add or remove columns that it needs for working with project management table. The system will memorize users choice and supply the user with selected project table outlook every time, when the user logs in into the system.



Designers table consists of the following columns:

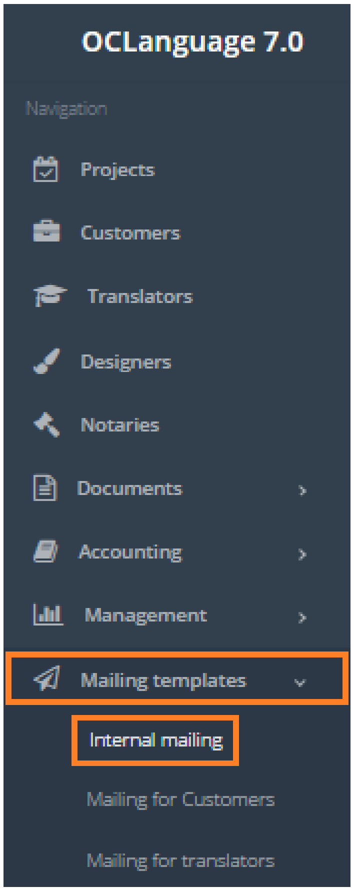
Field	Description

Name	Designer’s name
Surname	Designer’s surname
Address	Designer’s residence address
Pages/day	The amount of pages designer is able to handle per day
Price	Price per page
Status	Availability of designer: marked with green tick, if available marked with red cross, if not available

9. E-mails

9.1. System automatized e-mails

To open OCLanguage e-mail server section, in the main menu click “Mailing templates -> Internal mailing”.

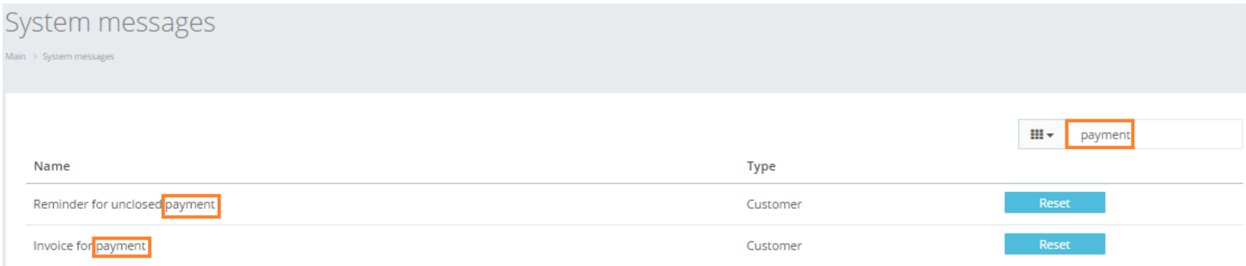


In this section the user can view and edit the content of e-mail templates that are automatically sent to recipients by the system itself.

! Please note that the system e-mail templates are subject to programming task for developers and are added along with the creation of new functionality, requiring an e-mail to be sent either to the Customer, translator or translation agency employee. Which means that the translation agency managers themselves are not able to create new system e-mails.

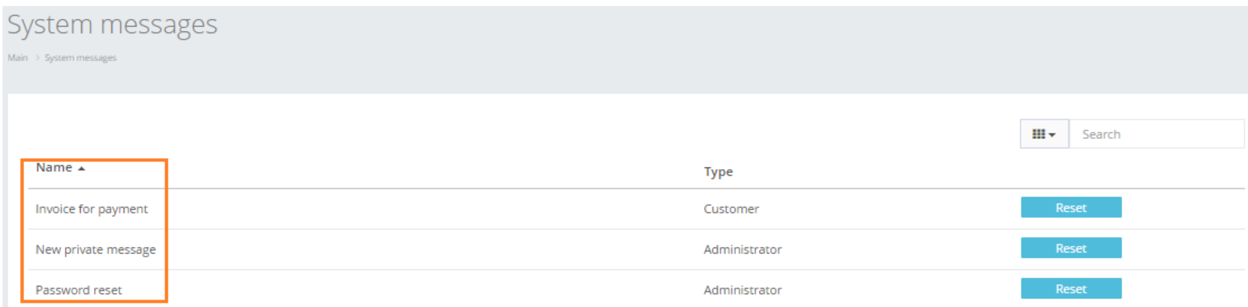
User can filter data in the E-mail templates database by using 3 methods:

1. Type letters or numbers in “Search” field and click “Enter” (the system searches according to template name).



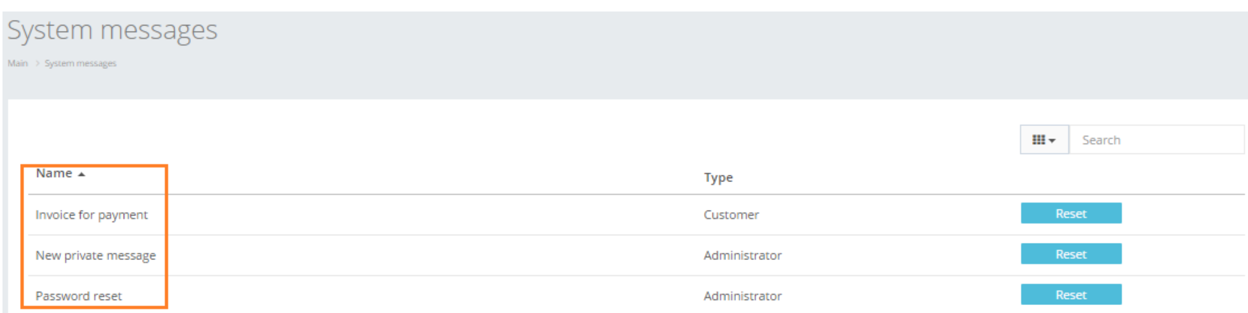
! Please note that data filter can be removed by deleting text in “Search” field and clicking “Enter”.

2. Filter data by sorting data from A to Z and vice versa by clicking on the column name.



3. Review the columns that you want to see in the Invoices table. To add or remove a particular column from the table, simply click and select the columns that you want (or do not want) to view in the E-mail templates database. This feature is especially relevant, if there are big databases with many columns and/or relatively small monitor/tablet/smartphone screen.

! Please note that the system will save these settings for upcoming user sessions.



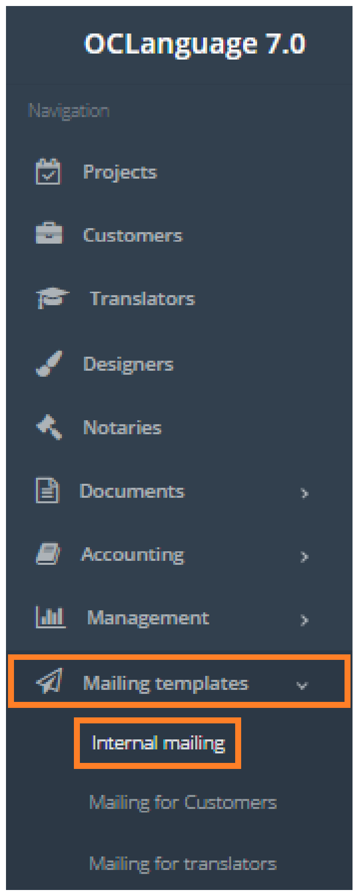
Translation agency’s managers are able to view and revise the text and formatting of every template. In the table below, you will see the explanation of logics behind every template:

Template	Description
New private message (TA management)	Text of e-mail, which says that the translation agency manager has received a new message in system OCLanguage
Reminder for unclosed payment	Text of e-mail message, which reminds the Customer that payment for a specific order has not been closed yet

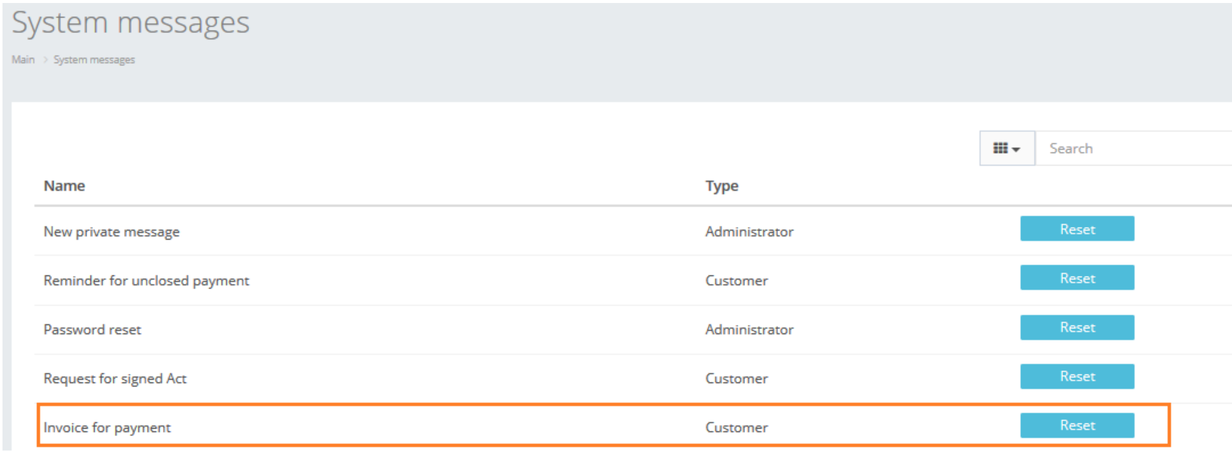
Password reset	Text of e-mail message providing a link for the user password reset
Request for signed Act	Text of e-mail message reminding the Customer, that he needs to sign the Act and send it to the translation agency
Invoice for payment	Text of e-mail message providing a new invoice to the Customer

In order to view and/or edit system e-mail follow the below steps:

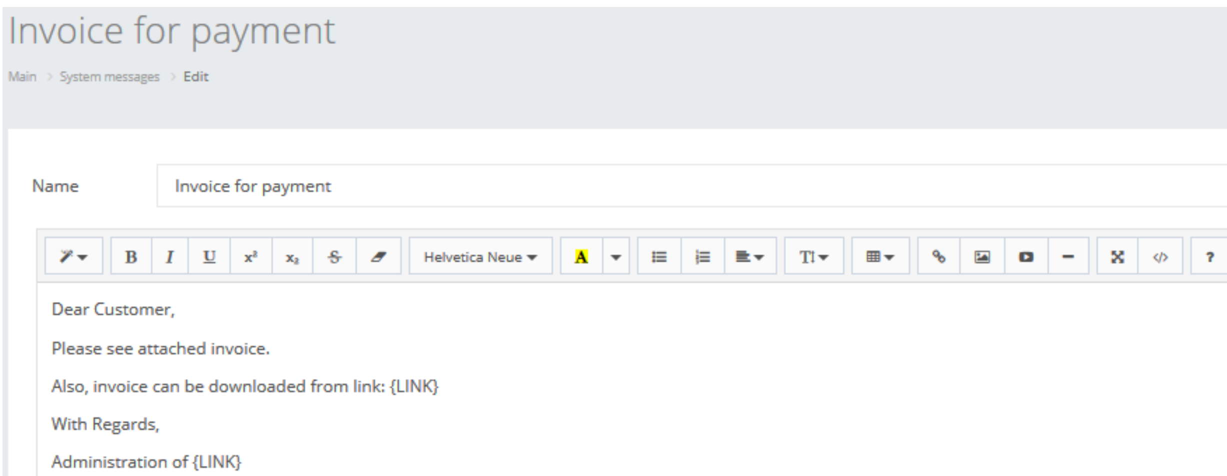
1. In the main menu click “Mailing templates -> Internal mailing”.



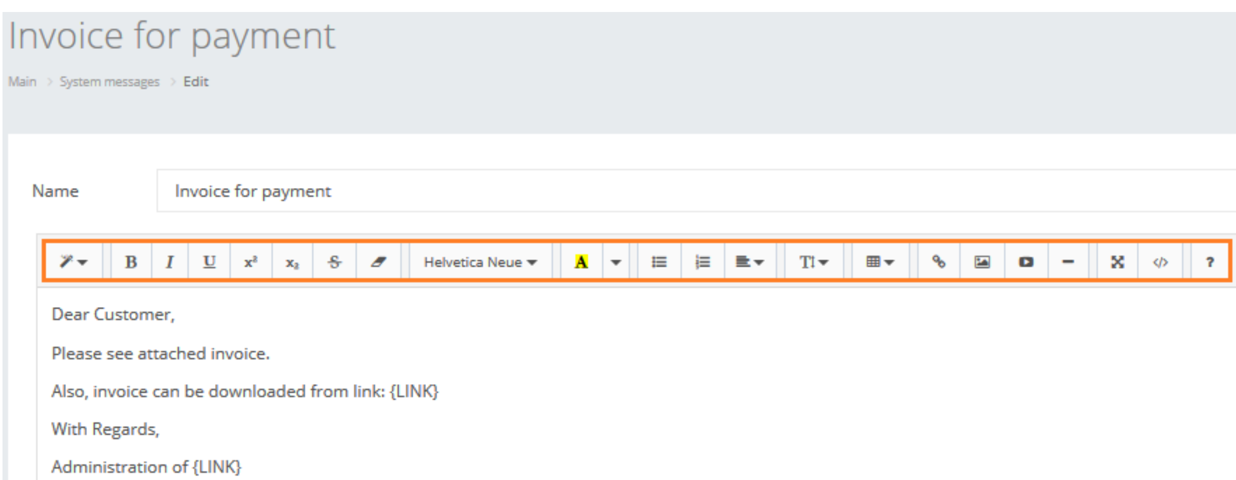
2. Click the template you want to view/edit.



3. The system will open the e-mail template in a new window. Have a look at the e-mail template name and content.



4. Edit e-mail template name and/or template itself. Template text can be revised using formatting panel above the template name.



E-mail text formatting panel consists of the following options:

 - Style

 - Bold

 - Italic

 - Underline

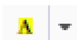
 - Superscript

 - Subscript

 - Strikethrough

 - Remove font

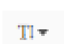
- Choose font

 - Recent color

 - Unordered list

 - Ordered list

 - Paragraph

 - Line height

 - Table

 - Link

 - Picture

 - Video

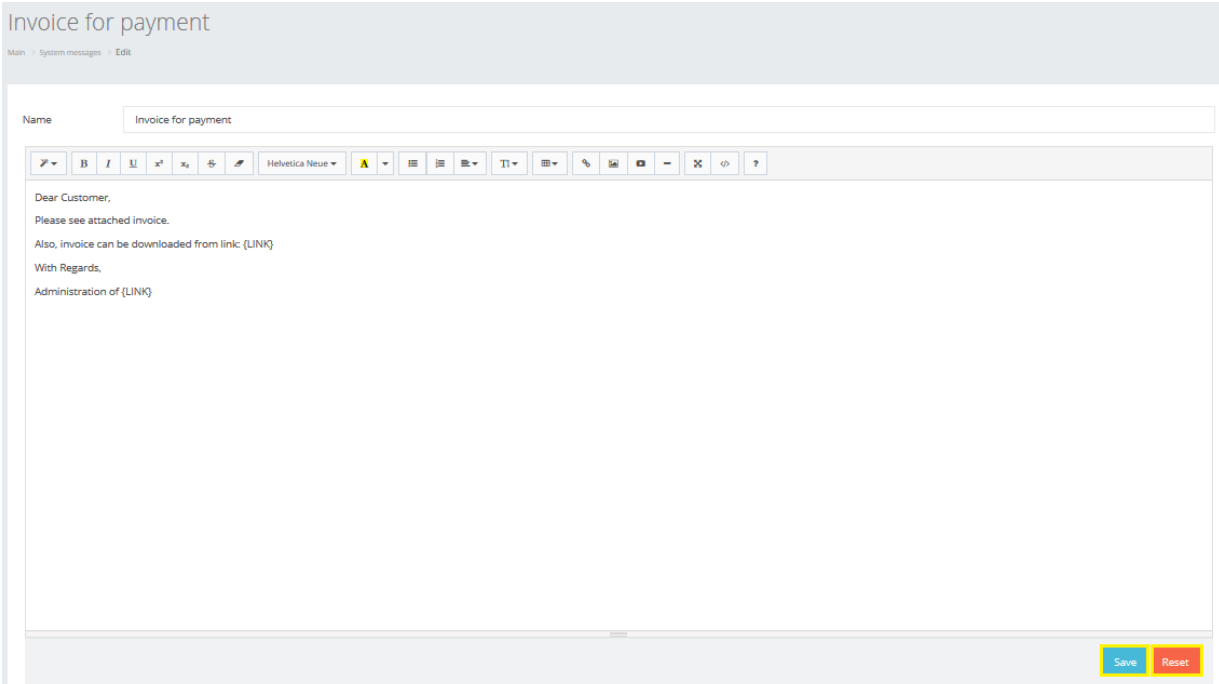
 - Insert horizontal rule

 - Full screen

 - Code view

 - Help

5. Click “Save” to save the changes made. If you wish to reset the template to initial setup, click “Reset”.



9.2. Work with macros

System user is able to use macros in order to set desired parameters or variables, which OCLanguage engine should use, while sending specific e-mail. In the table below you will see the description of all variables that can be used in OCLanguage templates. In order to use variable in your template, simply copy it from the list and paste it into the e-mail template.

Main variables	
CODE	**DESCRIPTION**
{NAME}	User's name
{SURNAME}	User's surname
{PATRONYMIC}	User's patronymic
{FIRM NAME}	Company name
{FIRM ADRES1}	Legal address
{FIRM ADRES1 2}	Legal address, cont.
{REG NR}	Registration No.
{LOGIN}	Login
{E-mail}	E-mail
{ACTIVATION CODE}	Activation code
System variables	
CODE	**DESCRIPTION**
{COMPANY NAME}	Company name in Russian
{COMPANY NAME ON ENGLISH}	Company name in English
{CONTACTS}	Company contacts
{ESSENTIAL}	Company details
{DIRECTOR}	Company Director
{CURRENCY}	Default currency
{COMPANY REG NR}	Company registration No.
{ADRES1}	Legal address
{ADRES1 ON ENGLISH}	Legal address in English
{ADRES2}	Actual address
{ADRES2 ON ENGLISH}	Actual address in English
{BANK}	Bank
{ACCOUNT}	Account
{CONTACT E-MAIL}	Contact e-mail address
{WEB SITE}	Website address

! Important to notice, that the system variables require deep understanding of programing. Our specialists can assist you in studying macros and options that they make available.

9.3. Customer and Translators templates

In previous versions of OCLanguage there was the functionality of Customer and translator registration in OCLanguage for automatizing whole ordering and order fulfillment process. In the newest version of OCLanguage 7.0 there are no virtual offices neither for the Customer, nor for vendors. Thereby in comparison to the previous versions of OCLanguage, in “Mailing templates” section there are no workable system messages, that are created for sending to the Customer and vendors offices.

Also, due to the Russian Federation legislation changes in OCLanguage 7.0 there is no Customer/vendor proposal e-mail templates. For the Customers from other countries our developers can set up the e-mail templates for Customers (new pricelist announces, discount politics changes etc) and vendors (new language pairs announces, new pricing information for vendors etc).

10. System requirements

10.1. General information

OCLanguage is a very flexible solution and it requires small amount of resources; it can be installed on either of the following three platforms:

1. Hosting
2. Virtual server
3. Physical server.

The aforementioned options are relevant to those Customers who purchase the perpetual license of OCLanguage.

In case of SaaS license, OCLanguage is installed on the servers that belong to SIA OCL.

10.2. Software

OCLanguage has the following requests in regards to software platform lying on the top of physical server:

- Web Server: Apache
- Technology on server-side: PHP 5.4+, JavaScript
- Technology on client-side: HTML pages with JavaScript
- Database: MySQL 5+ (with virtual tables support)
- Recommended browser: Google Chrome.

10.3. Hardware

OCLanguage has the following requests to configuration of the server, on which the solution will be installed.

Required for system use:

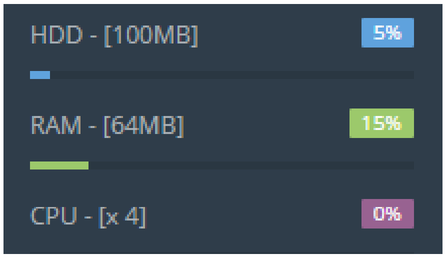
- HDD minimum reserved disk space for system configuration (not project data): 170 MB
- CPU: 333 Mhz
- Minimum RAM: 64 MB.

In addition, required resources per user:

- Minimum additional RAM: 16 MB
- Recommended additional RAM: 64 MB.

Example: let us imagine you have 10 users on board, which are issuing system data 20 MB per day each. In this case, we would recommend you would have at least CPU 333 Mhz, RAM 768 MB, HDD 55 GB (for 1 year).

In a new version of OCLanguage 7.0 a special mechanism for tracking hardware resources usage was implemented. In the main menu the user can always see how many CPU and Hard drive resources are being used at the moment.



10.4. Data storage

In order to secure your stored data against loss, we recommend the following actions:

- Storage RAID level 1 or higher
- Regular data backup to tapes or cloud services.

On the database level, a database administrator manages access to the data.