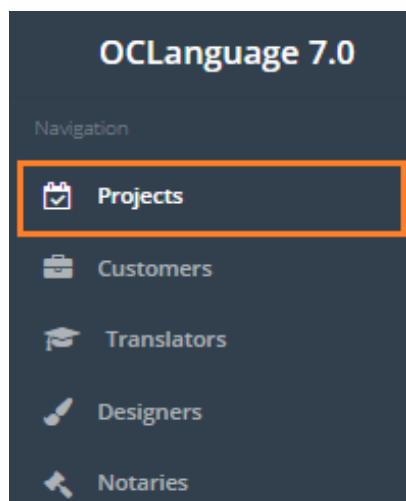


7.3. How to add task

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.

The screenshot shows a "Projects" list view. At the top, there are buttons for "Delete" and "Add project". Below that is a table header with columns: Project, Project name, Deadline for Customer, Internal deadline, Type, Status, Customer, and Manager. A single row is shown below the header, representing the project "90-001 Alpha project" with a due date of "26.07.2017". The "Type" column shows "Written", the "Status" column shows "Awaiting confirm...", and the "Customer" and "Manager" columns show "Smith John" and "Karlis" respectively. The entire row is highlighted with an orange border.

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

The screenshot shows the "Alpha project" review page. At the top, it says "Main > Projects > Project review". Below that is a navigation bar with tabs: "Project", "Tasks 1" (which is highlighted with an orange border), "Purchase orders (PO) 2", "Acts of Acceptances 1", and "Invoices 0".

4. Click “Add task”.

The screenshot shows a "New task" form. At the top, it says "Main > Projects > Project review". Below that is a navigation bar with tabs: "Project", "Tasks 1" (highlighted), "Purchase orders (PO) 2", "Acts of Acceptances 1", and "Invoices 0". The main area is titled "New task" and contains a single button at the bottom right labeled "Add task" with an orange border.

5. Fill in the task data.

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

Field	Description
Task name	<p>Specify task name.</p> <p>! Please note that the task name is revealed in invoices for Customers and PO documents for vendors.</p>
Task type	<p>Specify task type:</p> <ul style="list-style-type: none"> • 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. <p>! 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”.</p>
From language	Specify from which language the translation will be performed
Into language	Specify into which language the translation will be performed
Translation type	<p>Specify translation type – choose either from options:</p> <ul style="list-style-type: none"> • Technical • Legal • Economics • Medicine • Customs • Science • Personal.
Vendor	<p>List of vendors, which are able to handle the above specified task</p> <p>! In case of translators the system will bring up only those vendors, whose availability status is positive.</p>
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	<p>Upload working materials that are used to prepare the required task.</p> <p>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.</p>
Documents for Customer	<p>Upload a result file that is submitted to the Customer.</p> <p>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.</p>
Technical requirements	Specify technical requirements related to the task.
Information for vendor	<p>Specify information for the vendor related to the task.</p> <p>! Please note that this field is for translation agency's internal use only. The information is NOT included in Purchase Order (PO) document.</p>
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 ▼

Include task in invoice and act

Completed

Add taskSave Issue agreement Issue invoice Delete