



# PACKAGE MANAGEMENT IN ONLINE PROJECTS

For project managers



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This guide covers **memoQ 2013 R2, 2014, 2014 R2 and 2015** edition. It contains text items from the English user interface of the program. These items are under constant verification and are subject to change without prior notification.

## 1 General

memoQ's workflow enables you to work with online and local projects. You also have the flexibility to publish a local project to your memoQ server later on.

Previously, it was only possible to create packages (handoffs) from local projects. Now the package-based workflow for online projects extends the workflow possibilities in memoQ and adds administrative functions. This makes your life as a project manager easier, especially on projects which contain a large number of files. Packages enable you to create packages from online projects for server documents and desktop documents (with or without memoQWebTrans).

Sometimes your workflow may require a mix: a package for one vendor or freelancer, and no package but a "normal" online assignment for a translator on the other hand. You can do both. You can adjust the workflow according to the project needs on the fly.

Using packages can help you in the following scenarios:

- You have a project with many users who would synchronize directly with huge TMs, performance issues may arise. Attaching an extracted TM (a project TM) for the project and handing off that package will reduce this burden – the central TM is used only for reference and updates at the end of projects.
- Project participants may have network bandwidth issues.
- You may not want users to access your memoQ server.
- If you are the customer, you can create packages for your vendors, and your vendors can proceed with the package also on their memoQ server.

### 1.1 Setting up a user for package use




In the **User properties** dialog, you need to enter details of a new user on the memoQ server or change details of an existing user. You can access the user properties from the **Tools** menu, choose **Server administrator**, and connect to your server. Click the **User management** category, then, below the user list, click **Add**, or select a user, and click **Edit**.

**It is important to specify the package workflow for a user in order to be able to use packages.**

**If you use the package workflow, you cannot assign a Subvendor to a package.**

**You can specify the package workflow in a project template (see the memoQ project template guide, available [here](#)).**

In the **User information** section, you have a **Package workflow** drop-down list. Use this drop-down list to specify the package workflow for the user. Choose from the following options:

- **online (no packages):** the user cannot check out packages from your memoQ server, he need to check out the online project assigned to him instead. Icon: 
- **both:** the user is allowed to import packages as he does for Handoff packages created from a local project; he can also check out packages from your memoQ server as he would check out an online project. Icon: 
- **packages only:** the user can import \*.mqout packages and check out packages from your memoQ server, but he cannot work on a "normal" online project with server or desktop documents.  
Icon: 

You can always change the package workflow option for a user in the **Server administrator > User management**.

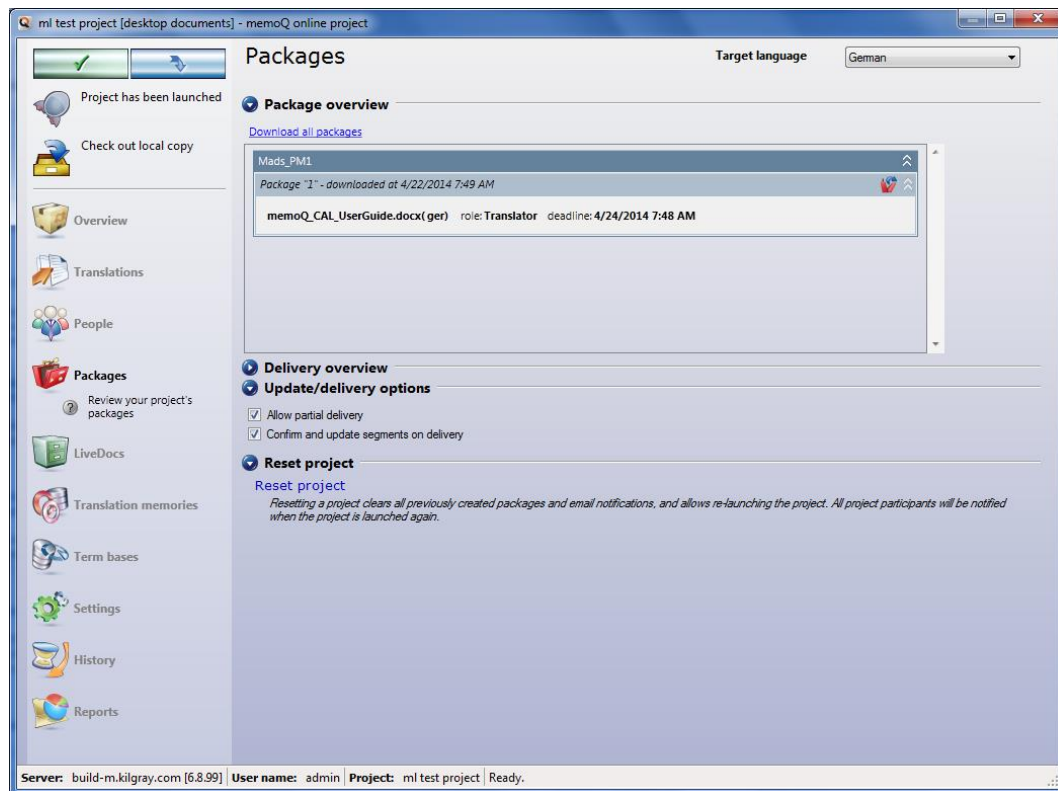
## 2. Package creation in an online project


This section describes the steps for project launch and package creation:

1. When you create your online project, you need to check the **Allow package creation** check box in the **Create new online project** wizard to enable package creation for this online project. If you do not check this check box on project creation, the **Packages** pane will not be available. You cannot enable packages after project creation if you did not check the **Allow package creation** check box in the first place.
2. After you created the online project, added the translatable documents and resources, you need go to the **People** pane. Select and add the users for your project. Before you can create packages, you need to assign the users to the documents in the **Translations** pane.

The package stores the role of the user. You can assign the same user twice. If for example the same user is **Translator** and **Reviewer 1** for the same file, then the following happens:

- The package is created for the user as **Translator**.
  - The user opens the package, translates, and delivers.
  - The Translator package is processed, the **REV1** package is created.
  - The user opens the **REV1** package (this creates another project in his memoQ desktop application), reviews, delivers.
3. Then launch the project. Click the **Click to launch project** icon. Then the packages are displayed in the **Package overview** of the **Packages** pane:



4. Click the Download icon (  ) to download a package. Specify a location to save the package. The package is a \*.mqout file. It contains the files as MQXLZ files, and the resources according to your settings (project TM and TB or copy of all TMs and TBs or links to TMs, TBs and corpora). Click the **Download all packages** link to download all packages at once.
5. Click the arrow icons to show or hide package details. In the **Package overview**, you can see package details: files in the package, assigned role and deadline. In the **Deliver overview** details, you can see the delivered file names and the whether the delivery was accepted or not.
6. If you allow the users access to your memoQ server, you do not need to download the packages. The user can directly check out the package (**Project > Check Out Online Project...**).

**Note:** In a package-based workflow for online projects, you cannot assign a subvendor group. If you want to assign a subvendor, then this vendor needs to have one user account on the memoQ server.

**Note:** FirstAccept and GroupSourcing are allowed for users, who are allowed to check out the project as a synchronized copy. These assignments, however, are not considered when creating packages.

## 2.1 Resource options for your packages

When you create an online project, you can choose the resource options for your packages:

- To link to your remote translation memories, term bases and LiveDocs corpora,
- To create an offline copy for your entire TM and term base to be included in the package,

- To create and include project TM and TB to create a project TM and a project term base and to include these resources in the package. This happens when the package is created. Project TMs and TBs reduce the size of a package, the package becomes smaller. This is also handy when your translator works in a country with bad Internet connection to download the package.

#### Project TM and TB:

In a project TM, memoQ collects all segments from the translation memories and LiveDocs corpora that give a result during translation, no matter of the quality. Project TMs are subsets of large TMs that are relevant to translation projects.

A project term base only contains the terms from the project. The memoQ server performs a TB lookup for all segments, collects the IDs, and exports the found terms into a CSV file. You can also assign a qTerm term base to your project, and memoQ will create a project TB from your qTerm term base.

## 2.2 Notifications and e-mail templates

When you launch the project, the project participants are notified as in online projects without packages. You can check and adjust the e-mail notifications in clicking the **Settings** icon. Then click the



**Communication** icon: . You have 2 package specific options in the **Document assignment and workflow-related notifications** section: **Missed deadline** and **Upcoming deadline in the next 24 hours**. You receive an e-mail notification when a deadline of a user is missed and when there is an upcoming deadline. memoQ is checking the deadlines every 30 minutes and then sends the notification e-mails in a batch. If you use update packages, you can also enable notification in **checking the Update package available** check box.

The newly active user is notified when a package is delivered or returned. You as the project manager can also put yourself in CC to all e-mails being sent out by the memoQ server.

You can also customize the e-mail notifications for packages which you sent out. In the **Server administrator**, click **Configuration and logging**. Navigate to the **E-mail templates** tab. Here you can customize the e-mail templates.

## 2.3 Update package

After you created the packages, you may need to update your project: add documents, reimport documents, or remove documents. Updated documents keep their user assignment, but you need to assign newly imported documents.

Assign a different user or a new user to the documents, and click the **Apply** button to apply the changes, go to the **Packages** pane and download the new package or the user can check the package out (if the user is allowed to access your memoQ server). For each change in the project, e.g. adding a document, a new package is created and needs to be downloaded or checked out.


## 2.4 Project manager override mode

It is not possible to deliver a not fully translated document, but if it is absolutely necessary to deliver a partially translated file, the translator can export this file as MQXLZ file. You can then override the package workflow and import the MQXLZ file into your project.

If the user is assigned to the Reviewer 1 or Reviewer 2 user role, he can return the package to the previous actor in the workflow. When the user decides to return the package to the previous actor, memoQ will automatically update the package for the previous actor(s).

## 2.5 Reassigning documents


You may want to assign a document to someone else after the documents were already assigned and the packages created.

After you launched the project and the packages were created, the document assignments in the **Translation** pane are locked. The documents appear in a gray background, and the Lock icon next to **Translations** is closed: 

The following command links are then not available and grayed out:

**Confirm and update rows, Pre-translate, Assign, Auto-assign, Change workflow status**

You can click the Lock icon next to **Translations** to unlock the document assignments and to reassign the documents. The document background is no longer gray, it turns white.

The Lock icon appears open: 



## 3 Package download / checkout

When you use a package-based workflow, then your translators and reviewers can either check out the package or import the package as they would do for local projects: **Project > Import package**.

### 3.1 Package download

If you do not grant your translators access to your memoQ server, then you need to download the package for them, and send the package to them. Set the package workflow type to **Packages only** in the **User properties**.

Then your translators and reviewers cannot check out a package from your memoQ server. You need to download the package for them. The package is a **\*.mqout** file. You need to send this file to your translator. You can download all packages in a batch process. All packages will be downloaded in one folder. Packages are ZIP files, and also contain the user name being assigned to a package, for example "Packages-ML".

**Note:** The translator needs to create a **\*.mqback** file to deliver the translations.

You can reset a project in the **Packages** pane in clicking the **Reset project** link which does the same as the clean notification history command. Resetting a project clears all previously created packages and e-mail notifications, and allows re-launching the project. All project participants will be notified when the project is launched again.

### 3.2 Package download from memoQWebTrans

The translator or reviewer can download packages for online projects and deliver them via the memoQWebTrans interface.

You need to check the **Allow package creation** check box in the **Create new online project** wizard.

When the package was created, the translator can sign in to memoQWebTrans and download the package from the **Package tasks** tab.

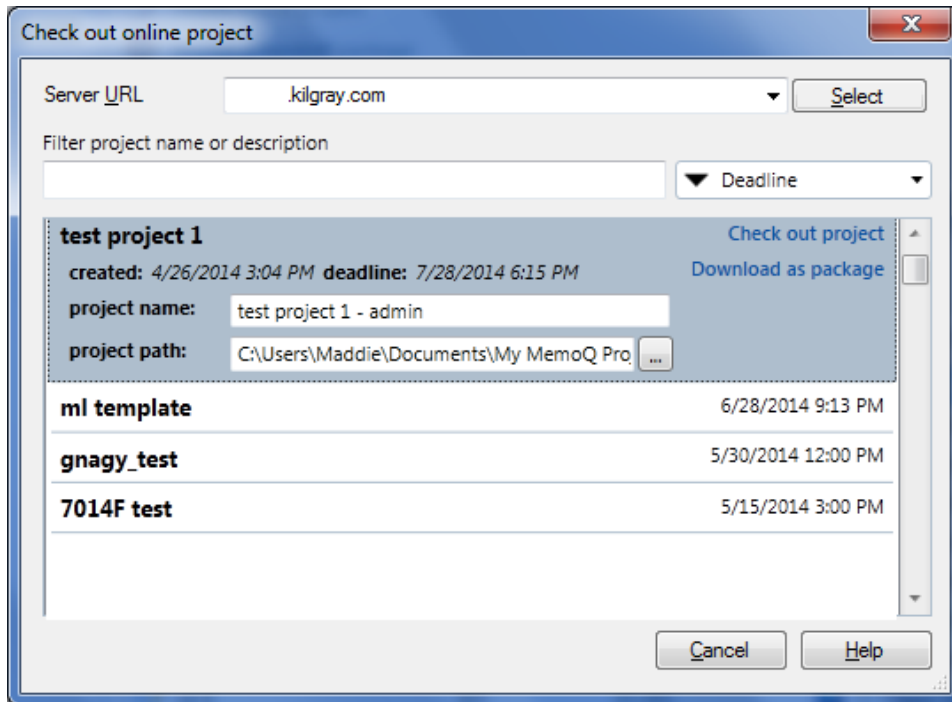
### 3.3 Package download from memoQ server

You can also allow your translators and reviewers to download a package from your memoQ server directly. For doing so, they need to access your memoQ server. Set the package workflow type accordingly in the **User properties**:

- If you set it to **Both**, the user can either download the package or check out the online project.
- If you set it to **Online**, the user cannot download packages, he can work only work on online projects, and check out online projects, but no packages.

- If you set it to **Packages only**, the user can only download packages, but he cannot check out an online project from your memoQ server.

Download the package. Go to the **Project** ribbon tab, choose **Check out project from server**. In the **Check out online project** dialog, select your project, and then click the **Download as package** link.



## 4 Package delivery


When the translators are done translating, they need to deliver their translations. They can deliver all files in a final delivery, or they can do a partial delivery, if you have this enabled.

Translators and reviewers have the following options to deliver a package:

- upload the package directly to the memoQ server (there is no document synchronization ) when you are connected to the memoQ server,
- upload the package to memoQWebTrans,
- send the package back to your project manager in an e-mail.

**Note:** By default, memoQ attempts to connect to the memoQ server to send the package immediately.

When the translator delivers the package, and once the file transfer was successful, the memoQ server will automatically import the return package, and update the memoQ project. You see the delivered packages in the **Delivery overview** of the **Package** pane.

When the translator sends you a \*.mqback file, you need to go to the **Package** pane and import the return package. Click the Delivery icon: 

**Note:** In the **Update/delivery options** sections of the **Package** pane, you can define the automated steps when packages are delivered, e.g. to confirm and update the TM.

The project will automatically progress to the next workflow step, e.g. the translator sends the package back, and if there is a Reviewer 1 assigned, the status will be updated and the Reviewer 1 notified that he has a package waiting for him.

### 4.1 Partial delivery

Sometimes the project may require a partial delivery of files. If you work on a large project, your customer may want parts of the project delivered at certain deadlines. You can use the partial delivery option in the **Update/delivery options** section of the **Package** pane. Check the **Allow partial delivery** check box. The translators and reviewers can now deliver parts of the package. However, they can only deliver fully translated documents.

### 4.2 Package delivery in memoQWebTrans

When you created an online project with packages, and you are using memoQWebTrans, your translators and reviewers can [downloaded the package](#) on the **Packages** task tab of [memoQWebTrans](#), and they can upload the delivery package there as well.

When the upload from the translator was successful, then the documents advance to the next workflow step.

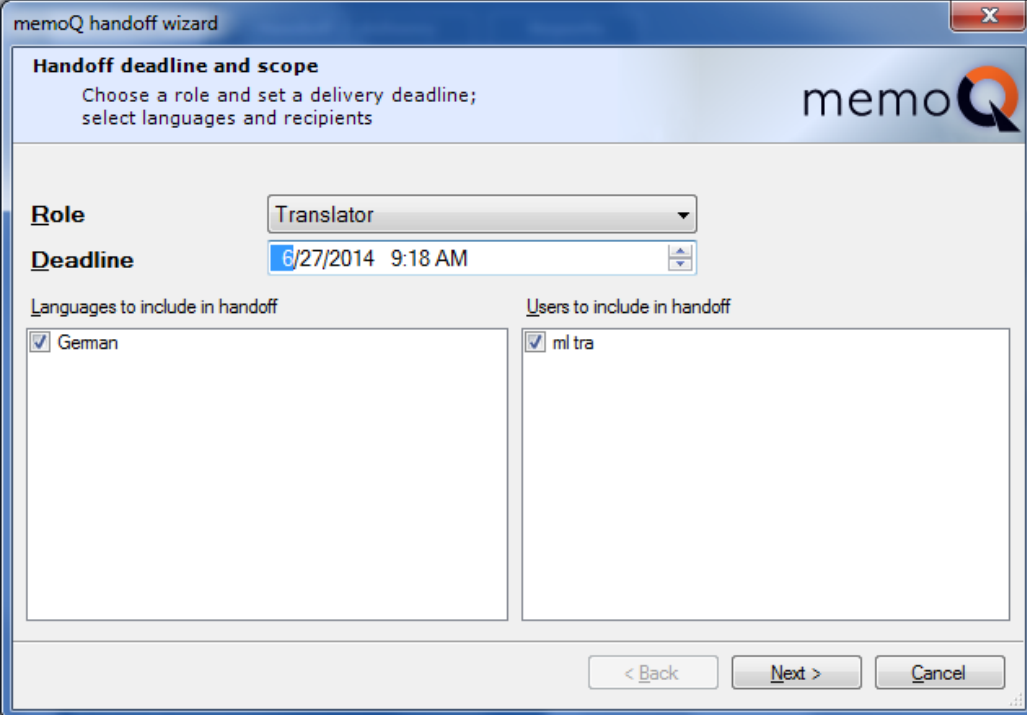
## 5 Package creation in a local project

You can also create a local project, and create a handoff from this local project. Local projects can have remote resources such as translation memories and term bases that are stored on your memoQ server. The memoQ handoff wizard creates handoff packages from a local project where the documents and the tasks were assigned to users.

### Follow the steps below:

1. Create a local project. Click [here](#) to learn how.
2. In the **Translations** pane of **Project home**, assign all documents and all tasks to users. Then navigate to the **Overview** pane, and, in the **General** tab, click **Check project now** first. Then, in the **Handoff/delivery** tab, click **Create new handoff package**. Alternatively, you can click **Create new handoff** in the **General** tab too.
3. The handoff wizard starts:

### Step 1: Handoff deadline and scope



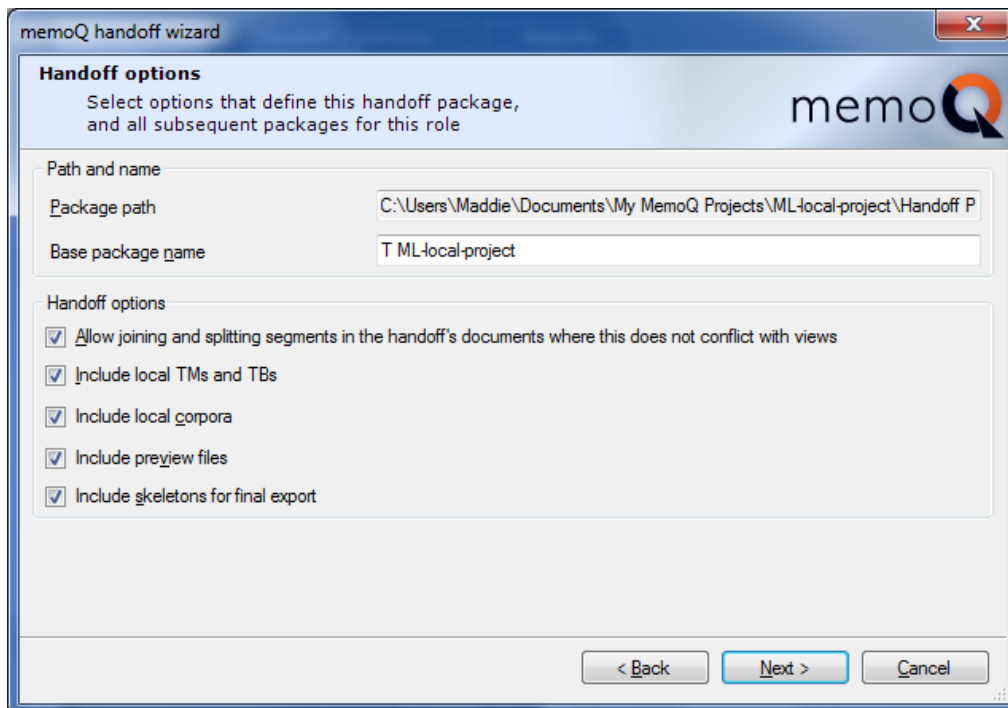
The screenshot shows the 'memoQ handoff wizard' dialog box. The title bar contains the text 'memoQ handoff wizard' and a close button. The main area has a header 'Handoff deadline and scope' and a sub-header 'Choose a role and set a delivery deadline; select languages and recipients'. Below this, there are four sections: 'Role' with a dropdown menu showing 'Translator'; 'Deadline' with a date and time picker showing '6/27/2014 9:18 AM'; 'Languages to include in handoff' with a list box containing 'German' and a checked checkbox; and 'Users to include in handoff' with a list box containing 'ml tra' and a checked checkbox. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

- **Role:** Select the task (**Translator**, **Reviewer 1**, **Reviewer 2**) to create the handoff for.
- **Deadline:** Set a deadline for the task being handed off.
- **Languages to include in handoff:** Check the check box for each target language where you want the task carried out. By default, all target languages are selected.
- **Users to include in handoff:** Check the check box for each user for whom you want to create a handoff package. memoQ creates one handoff package per user and per target language. (If

a user translates into two languages, she will receive two handoff packages.) By default, all users are selected.

Click **Next** to proceed. Click **Cancel** to leave the wizard without creating the handoff packages.

## Step 2: Handoff options



- **Package path:** Location and name of the folder where the handoff packages will be created. You cannot change this folder.
- **Base package name:** All handoff packages have a project name. By default, the base package name contains the abbreviation of the task and the original project name. When creating an actual package, memoQ appends the language code, the name of the user, and the date.
- **Allow joining and splitting segments...:** check box: Check this if you want to allow the users to join and split segments in their work. However, if you want to keep the segments in sync for various target languages, turn off this option.
- **Include local TMs and TBs** check box: If this is ticked, the package will contain a TMX export of all local translation memories, and a CSV export of all local term bases, so the same local resources will be available to the user who receives the handoff. If the project uses online resources, the handoff package will contain references to the online resources.

**Important:** When you add a local translation memory or term base to a handoff package, the whole resource is sent to the translator in the package. No extraction is performed. If you add an online TM or TB, the package will contain a reference only, and the translator will use that online TM or TB directly. The delivery (.mqback) does not contain any TM or TB content, just the documents.

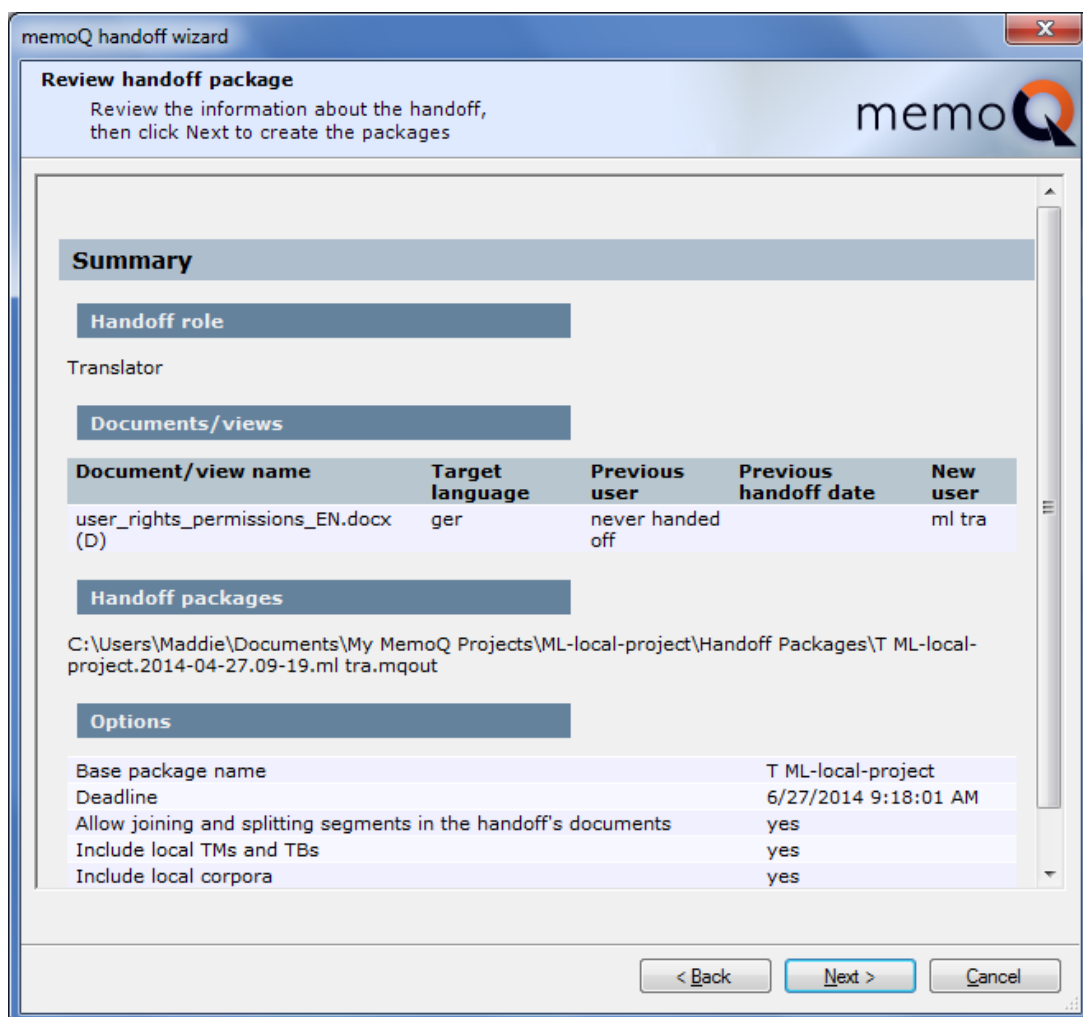
- **Include local corpora** check box: When this is ticked, the package will include the local LiveDocs corpora used in the project. The corpora are included in a binary internal format,

and also in the form of XLIFF files so that they can be loaded into other tools. memoQ will use the binary files.

- **Include preview files** check box: If this is checked, the package will contain preview files so that the translator will see a real-time preview of the document she is translating. Uncheck this if you want a smaller package.
- **Include skeletons for final export** check box: If this is checked, the translator receiving the package will be able to export the formatted translation from the project. Uncheck this if you want a smaller package.

Click **Next** to proceed, **Back** to return to the first page and change settings there. Click **Cancel** to leave the wizard without creating the handoff packages.

### Step 3: Review handoff package



The last page of the wizard lists all files and handoff packages to be created. You can check here if all settings are correct. If not, click **Back**, and change the options. If the settings are correct, click **Next**. memoQ will create the handoff packages – this might take several minutes depending on the size of the project –, and return to the **Overview** pane of **Project home**.

Click **Back** to return to the previous wizard page. Click **Cancel** to leave the wizard without creating handoff packages.