White Paper

Customizing Workflow Management: The Worx Approach

Workflow management: what, where and why?

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Workflow management is one of those unavoidable phrases that seem to crop up at operational meetings about every 60 seconds. Perhaps it sounds just like a buzzword; you might feel like your system already has everything under control. But, across many industries and in many different working structures, using a tailored workflow management solution is often the quickest way to save time and money while improving quality.

Today's workflow management systems are complex pieces of software, designed to automate as much of your workflow as possible. The goal is to improve communication between departments, eliminate inefficiencies and save everyone time so they can concentrate on important core tasks. Critically, workflow management software ensures that everyone knows what they are doing and the deadline for that particular task.

In the localization and translation industry, the challenges are similar to many other sectors. Complex projects using multiple internal and external teams need to meet tight deadlines and adhere to strict budgets. Costs have to be managed and resources planned while allowing for client changes and project team queries. Purchase orders (POs) need to made, invoices paid, schedules agreed.

So far, so standard. But, as every experienced localization project manager (PM) will tell you: no two projects are exactly alike. Every step of the process has multiple variables that are subject to change. What if you require an additional linguistic quality assurance (LQA) step? Or you need functional quality assurance (FQA) testing to take place earlier on in the process? What if your localization workflow software needs to be able to access specific databases at different stages?

In the real world, you need your localization workflow management software to be able to adapt to and cope with a huge range of changeable project elements.

Customize your way out of a sticky situation

If a localization workflow management tool is the best way to track projects and allocate tasks and responsibility, then it needs to reflect the actual processes as they happen within your organization.

You need to be able to work out quotes for localization projects based on supplier price lists and use them to create POs; upload documents for translation and glossaries and termbases for reference; approve orders and assign tasks to in-house users and suppliers; store price lists and keep track of price margins; prepare invoices and close projects.

If you can find a software that can do all this, success is assured.

A number of aspects within localization workflows can be automated, depending on the type of document. For example, a marketing text can be automatically assigned to a specific team of transcreators. Once a translation is finished, it can be automatically assigned to a pre-defined reviewer. Invoices can be sent and classified automatically, ready for approval and payment by the accounts department. All with a couple of clicks of the mouse.

Having customized your localization workflow management software, you can sit back and relax. Safe in the knowledge that your processes will be faster and more efficient. And that you will easily be able to spot any bottlenecks and inefficiencies in good time, and take steps to ensure that the situation doesn't spiral.

But how can localization workflow management software be customized? Which aspects are critical for customization? And how easy is it? Every localization workflow management software program is different, and of course they can all be customized to a certain extent. But while some programs simply allow you to change a couple of column headers in a table, other programs need an engineer to customize every stage of the process.

So where do you start? And how far do you need to go? We will try to answer these questions using the software Worx as our guide.

Three portals, one product

One of the great benefits of Worx is that it doesn't just have one entry point. It has three: a Client Portal, a Supplier Portal and a Management Portal.

This is based on our experience, which has consistently shown that everyone works best when they have just as much information as they need to know. Information overload is not helpful; extraneous details can cause confusion.

In a bid to simplify the UX (User eXperience) for everyone, each portal displays the information that is relevant to that group of users.

The Client Portal is the entry point for anyone who has a localization project. This is where you upload your localization projects as requests, approve or decline quotes, and track the project on its way to completion.

The Supplier Portal is the entry point for suppliers. They can track tasks, accept purchase orders and create invoices. They can also view reviews and send messages to the rest of the team. They can even manage their availability and log timesheets, so that their time and a specific cost can be allocated to a specific task within a project.

The Management Portal is where the magic happens. It allows managers to approve client quotes, create quotations, projects, purchase orders and invoices. This is also where computer-assisted translation (CAT) tools are integrated. Files uploaded by clients are loaded into CAT tools, which then analyze the word count based on the translation memories (TMs), and produce a final, weighted word count which takes into account any matches that are found.

This word count is then connected to the price lists, allowing an accurate quote to be created in seconds. And of course, this then feeds back into capacity management, as the translation teams know exactly how long each task is going to take. This "back-end" of the software also has a number of accounting features, including the ability to calculate profit margins based on the quotes and time spent on each task.

By splitting all of these features into different portals, Worx effectively limits access to key functions. The last thing you want is to find that a supplier has somehow managed to hack into your workflow and changed vital elements like the deadline.

It also limits the amount of training required by each user. Suppliers only need to worry about understanding the Supplier Portal. They don't even need to ignore menu items such as the *New request* button. It simply isn't there.

Let's go into a bit more detail about each of the portals and their customizable features.

The Client Portal

The Client Portal needs to be easily accessible and user-friendly. If your clients can't get to grips with it, they won't use it, causing you more work as you have to input everything manually. With that aim in mind, the user interface (UI) has been simplified, with three widgets for viewing requests, approving or declining quotes and tracking projects: *My requests*, *My quotes* and *My projects*.

Each of these widgets is fully customizable using filters and settings. This enables the client to focus on what is important to them, and filter out any surplus or irrelevant information.

The information can as usual be filtered by status, date, project name, etc. This allows the client to keep a close eye on the status of each project, and individual tasks within the projects. Should they make any changes to the status (by approving or declining quotes, for example), the PM will receive an automated email telling them that the project has moved to the next stage of the workflow.

The Supplier Portal

The customization of this portal is critical. An internal supplier is going to have a different view and set of options compared with an external supplier. This is particularly important for things like General Data Protection Regulation (GDPR).

As previously mentioned, there is a timesheet feature, where amount of time spent on tasks can be recorded and edited. This feature is only available to internal suppliers, for whom timesheets are a key aspect of tracking their own personal workload. External suppliers who have accepted a PO will have also accepted a price, or already have a logged price list, which will be tracked separately under *Invoices* in the Management Portal.

There is also the *View reviews* feature. This is an option that is only available to external suppliers if it has been enabled in the Management Portal. In this case, the supplier is able to see how a reviewer has rated their work, and any comments or feedback. If anything needs to be reworked, the PM can schedule this, and it will be automatically assigned to the supplier in question.

This is particularly useful for large projects with multiple tasks and deliveries. By allowing the supplier to see the final delivered version of a file, you ensure that they can take note of any important changes that have been made to their work. This includes things like terminology, style and consistency, particularly in the case of large projects which involve multiple suppliers.

The Management Portal

This is where the heavy lifting of customization takes place. Every aspect of the workflow as it is set up in Worx is regulated and defined within the Management Portal through a series of templates. And each of these templates can be customized for a specific project or client.

For example, as we already mentioned, you can integrate CAT tools and content management systems (CMSs) through the Management Portal. This means that any projects that arrive are automatically sent to the relevant tool to be analyzed using the client’s TM. This provides a weighted word count in seconds, taking account of any matches from the TM, and enables you to create an accurate quote in seconds. It also makes it easier to assign the tasks to users and track their progress, allowing the client to be informed of an accurate delivery schedule in good time.

In the past we have also built custom modules such as a studio diary for clients. This enabled them to attach a calendar entry to a project for when the related voiceovers were going to be recorded, allowing them to book studio time, resources and equipment right at the start of a project. These kinds of customizations have the ability to be absolute game changers in how you manage your workflows.

A UX that makes it extraordinary

One of the great things about Worx is the standout UX design. It makes the portal easy and intuitive to use, and is designed in such a way that everything you need for routine operations is close at hand.

The widget-based dashboard in particular makes it really easy to keep track of all key deliverables without losing sight of critical information like deadlines.

Using customizable templates, you can set up everything you need for particular clients and particular project types in advance. Then when the work comes in, it only takes a couple of clicks to set up and launch a project. And you can easily adapt even the largest of projects using the handy drill-down menus.

Standardization: the key to success

There is one common thread running through the customization of Worx, and indeed other workflow management software programs: standardization.

While it is of course important to customize your workflow management software so that it reflects your company's processes and priorities, you don't want to have to customize the workflow for every single project or task.

Once you have categorized your projects and worked out what each one requires, and the ways in which it differs (or doesn't differ) from your other projects, you can then configure your software so that it works optimally for that category of projects.

By categorizing projects in this way, you can set up your customized templates and processes once for each category. Then a request from a client for a particular project will trigger that specific, customized workflow. This eliminates a large amount of work for the project manager, and reassures the client.

It doesn't matter whether the project is going into three languages, or thirty-three. The project setup is the same, and involves a minimal workload. Maybe just a few additional file assignments…

But with fewer changes to be made overall, and everything set up to run correctly for the project automatically, your workflows will run smoothly from one stage to the next. Right up until the final delivery.

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