D Phrase

Phrase TMS - Quick Start Guide for Linguists

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Introduction

This guide covers the basics of Phrase TMS for linguists and provides you with a step-by-step approach to use it.

We will explore essential concepts such as job handling, working with CAT editors, terminology management, and QA features.

By the end of this guide, you will be equipped with the basic knowledge to explore other topics and more advanced features through Phrase Help Center documentation.



NOTE

Phrase TMS offers two main versions of the CAT editor, with almost identical CAT functionalities:

- · CAT web editor
- CAT desktop editor

Please note that all screenshots provided in this guide refer to the **CAT web editor** user interface.

Accept or Decline Jobs

Receive email notification and log in to Phrase TMS

· New users

A project manager will trigger a welcome email with login information. The message will contain your username and a link to reset your password. Once your new password is set, you can access Phrase TMS providing your credentials at https://eu.phrase.com/idm-ui/signin or https://us.phrase.com/idm-ui/signin.

· Existing users

Once a translation job is available, you will receive an email notification containing essential project details such as the language combination, deadline, and word count.

Log in to the Phrase Suite by providing your credentials at https://eu.phrase.com/idm-ui/signin or https://us.phrase.com/idm-ui/signin to access the Jobs page in Phrase TMS.

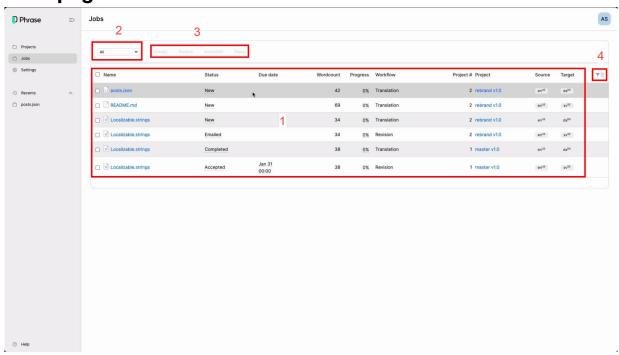


NOTE

If you have multiple Phrase TMS accounts, log in with username.

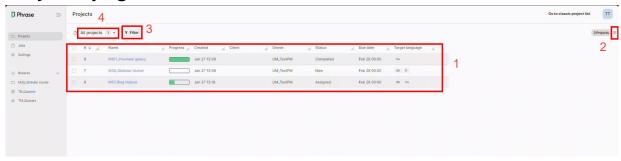
If you are a member of different Phrase organizations, select **Switch organization** from the Dashboard menu to switch to the desired account.

Jobs page overview



- 1. List of all assigned jobs across multiple projects with relevant details
- 2. Predefined filter based on job status
- 3. Buttons to change jobs' status
- 4. Options to customize and filter the jobs view

Projects page overview



- 1. List of projects containing your assigned jobs with relevant details
- 2. Clickable settings icon to customize columns displayed in the list
- 3. Options to filter the projects view
- 4. Dropdown menu with options to create, save and manage your projects view based on available filters

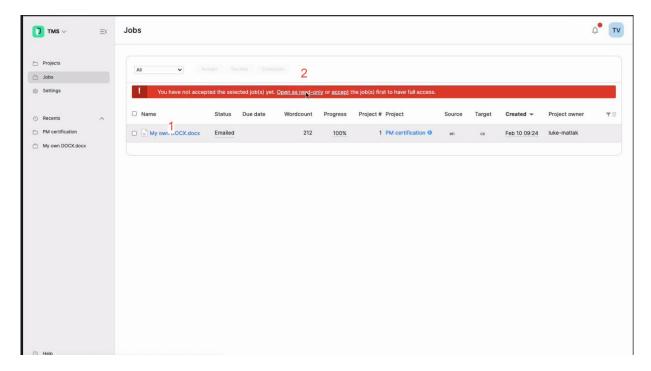
Click on a project name in the list to open the relevant project details page, where you will find:

- · Additional project information
- Available resources attached to the project (i.e. analyses, quotes, TMs, TBs, references)

Preview job content

Assigned jobs must first be accepted to start the linguistic task. However, you can preview the content in the CAT editor before accepting a job:

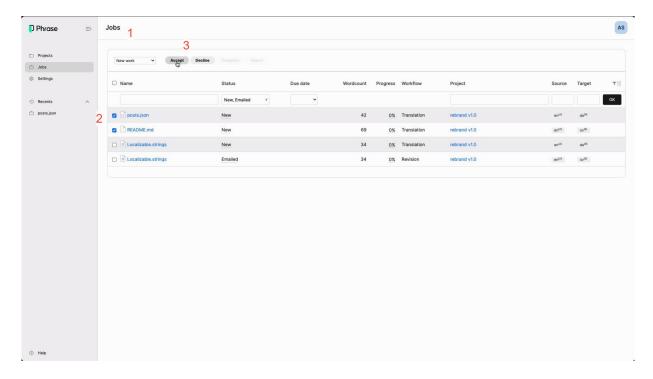
- 1. Click on the job name you wish to preview.
- 2. Select **Open as read-only** in the red warning message.



Accept or decline jobs

1. Select **New work** at the top of the Jobs page to view only assigned jobs that have not been accepted.

- 2. Select one or multiple jobs.
- 3. Click on the **Accept** button to accept the selected job(s), or click on **Decline** if you determine that you cannot perform the task.



Useful articles on Phrase Help Center

You can find additional information in the following articles:

- Linguist
- Jobs
- Sharing (in particular, see Error messages related to shared jobs)
- Projects

Translation Process

Open accepted job(s) in the CAT editors

· CAT desktop editor



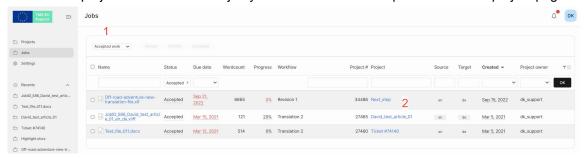
TIP

Using the CAT desktop editor is recommended in case of:

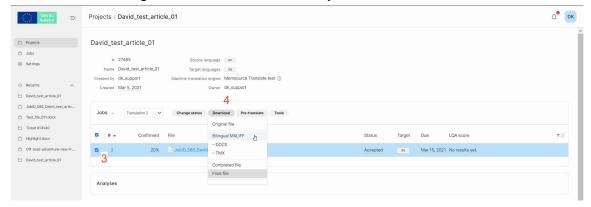
- Longer translations
- · Slower Internet connection
- · Offline work

Prerequisite: Download and install the CAT desktop editor by following the instructions provided in this article.

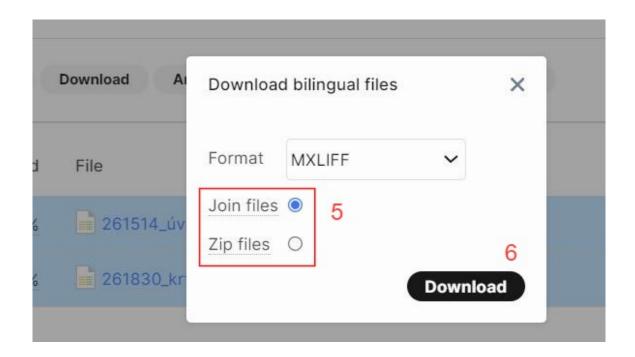
- Select Accepted work at the top of the Jobs page to view only accepted jobs that have not been completed.
- 2. Click on the project name next to the job you wish to work on to open the relevant project page.



- 3. Select one or multiple jobs in the project page.
- 4. Click **Download/Bilingual MXLIFF** to save the file to your local disk.



- 5. In case of multiple jobs, select **Join files** to download a joined single file (the target language must be the same). Otherwise, select **Zip files** to download a ZIP folder with individual files.
- 6. Click **Download** and open the downloaded file in the CAT desktop editor to start working.

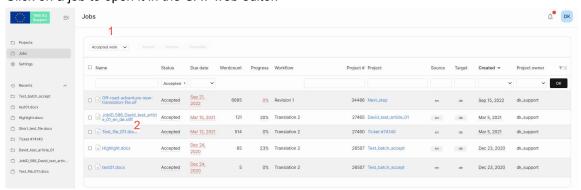




NOTE

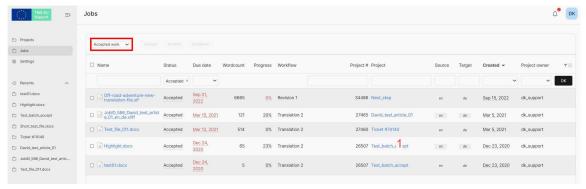
Working from the CAT desktop editor still requires entering your login information to leverage translation resources and sync the translation to the server.

- · CAT web editor
 - 1. Select **Accepted work** at the top of the Jobs page to view only accepted jobs that have not been completed.
 - 2. Click on a job to open it in the CAT web editor.

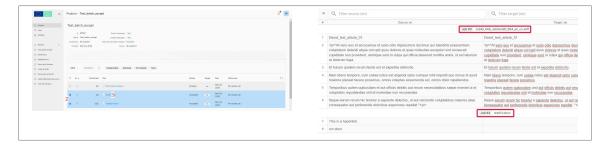


If you have multiple jobs belonging to the same project and into the same target language, you can also open all of them at once:

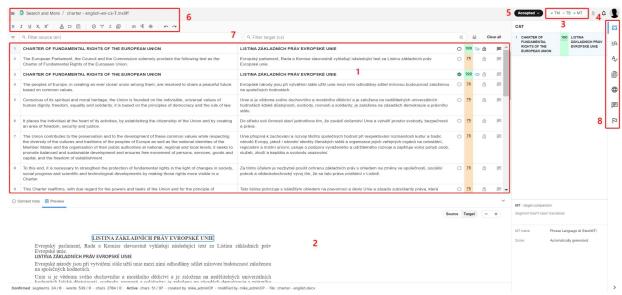
1. Click on the project name next to the job you wish to work on to open the relevant project page.



- 2. Select multiple jobs in the project page.
- Click on any of the selected jobs' name to open the whole selection in the CAT web editor.
 Multiple jobs will be separated with a bar indicating job number and filename.



CAT editor interface overview



- 1. Translation editor showing segments with source and target text
- 2. Preview section to display source or target document



NOTE

To display in-context preview, you need to enable it by selecting **Tools/Show preview tab** in the menu \equiv toolbar.

- 3. Resource status showing the connection status of available translation resources (TMs, TBs, MT)
- 4. Clickable paper clip icon indicating a reference file attached to the translation project
- Button to change jobs' status within the CAT editor

- 6. Menus \equiv and options toolbar
- 7. Search, filtering and sorting options
- Tabs to select and display relevant panes of the CAT editor

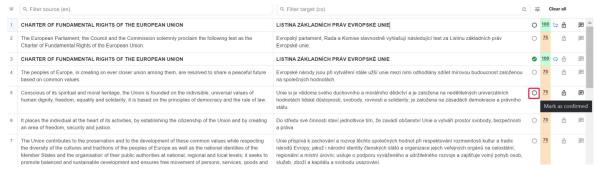
Work with segments

• Confirm

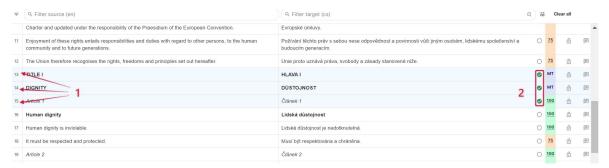
All translated segments need to be confirmed before completing a job. Confirming a segment saves the translation in the translation memory, if there is one attached to a project and is assigned in the *Write* mode.

There are multiple ways to confirm segments:

- You can confirm segments individually using keyboard shortcuts Ctrl+Enter or Cmd+Enter.
- Confirmation can also be done by clicking on the segment status icon.



- You can select multiple segments and confirm them at once:
 - 1. Press Shift or Ctrl/Cmd and click on the segment numbers to select them.
 - Confirm the selected segments using keyboard shortcuts, or by selecting Edit/Confirm segment from the menu toolbar.



• You can also select all segments using keyboard shortcuts and confirm them together.



NOTE

If you need to edit confirmed translations, remember to confirm segments again to reflect changes in the translation memory.

Repetitions

Segments repeated within a job are labelled as repetitions. The first instance of a repetition is identified with a heavy arrow and subsequent repetitions with a lighter arrow. Your confirmed translation of a repetition will be propagated throughout the rest of the text where the same source segment is repeated. Propagated repetitions will also be automatically confirmed. However, you can also edit the translation of a propagated repetition:

 Locate the repetition you wish to edit and click on the arrow icon next to the corresponding segment. The arrow icon will be crossed out to indicate a repetition exception.

- 2. Edit the translation as required.
- 3. Confirm the edited repetition exception.



· Search and Filter

You can use the CAT editor's filter section to search for text through different options.

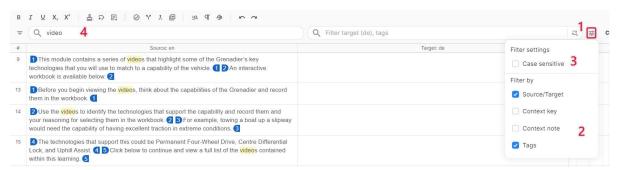
- 1. Click on the Filter settings button to open the relevant window.
- 2. Select the type of content you wish to search text in from the Filter by section.
- 3. Toggle on/off the Case sensitive setting as needed.



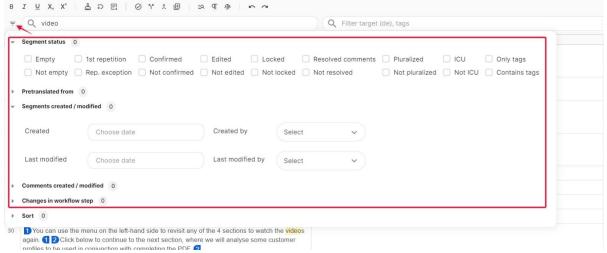
NOTE

If you are working in the CAT desktop editor, the Use regexp setting can also be enabled.

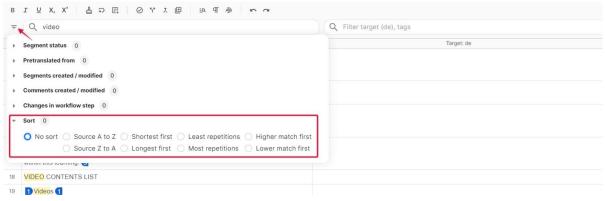
4. Type the text to be searched in the corresponding search box. Segments are automatically filtered to highlight search results.



If you need to perform more complex searches, click on the arrow next to the filter section to display advanced filters. Expand any of the advanced filters to apply the desired options.



You can also expand the Sort section to sort content alphabetically, by segment length, repetitions, and matches' score.



· Join and split

Whenever default text segmentation does not seem to follow a logical structure, it may be useful to join or split the segments as needed. Proper merging and splitting of segments can also impact the matches retrieved from the translation memory.



NOTE

Splitting or joining segments requires permission to edit the source granted by the project manager.

To join segments:

- 1. Click in a segment.
- 2. Click on **Join segments** thin the top toolbar, or use the corresponding keyboard shortcut. The selected segment and the one below will be joined. A blue j tag is automatically inserted in the text.

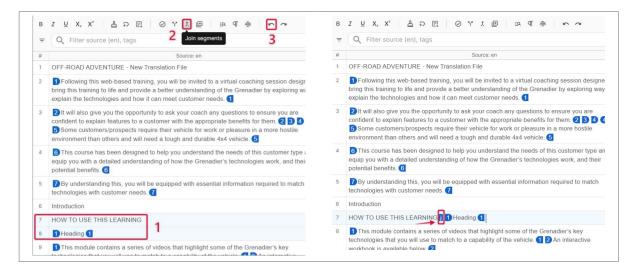


NOTE

The j tag must be preserved in the target text to achieve desired formatting in the completed document.

3. If needed, click on the **Undo** button in the top toolbar to cancel the operation, or use the corresponding keyboard shortcut **Ctrl+Z/Cmd+Z**.

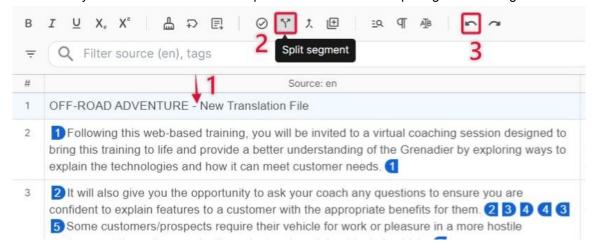
This will only work if no other action was performed between the joining and undoing.



To split segments:

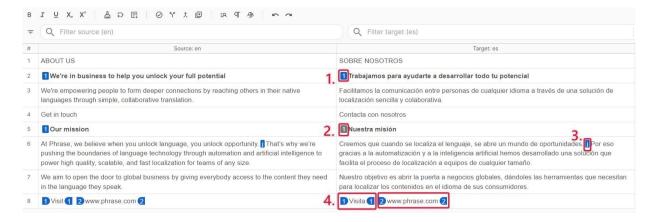
- 1. Place the cursor at the desired point in the source text.
- 2. Click on **Split segment** in the top toolbar, or use the corresponding keyboard shortcut. The segment will be separated at the specified point.
- 3. If needed, click on the **Undo** button in the top toolbar to cancel the operation, or use the corresponding keyboard shortcut **Ctrl+Z/Cmd+Z**.

This will only work if no other action was performed between the splitting and undoing.



Work with tags

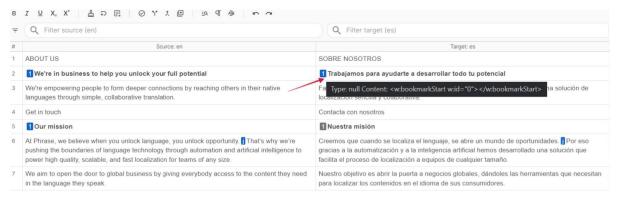
Source files may contain variables, special formatting, formal names, or code that should not be translated. These elements are displayed in the CAT editors as *tags*.



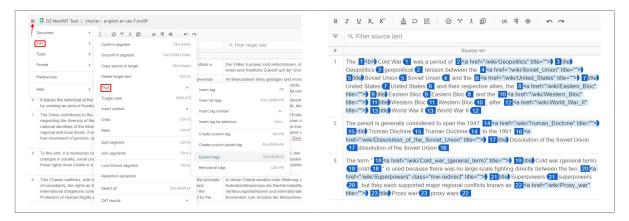
- 1. Unpaired/Single tags
- 2. Custom tags
- 3. Joined tags
- 4. Paired tags

You can preview tag content:

· By hovering over a given tag.



· By selecting Edit/Tags/Expand tags in the menu toolbar to preview all tag content.



Tags need to be preserved in the target text to ensure that formatting and variables are saved correctly in the translated file.



NOTE

If you have been granted appropriate rights by a project manager, you can edit tag content in the target language if required.

Press **F8** to copy tags from the source to the target segment.

Leverage translation resources

• TMs, TBs and MT matches (CAT pane)

The CAT pane displays suggestions that are available for the selected segment you are currently translating. These suggestions are derived from your translation memories, term bases, and machine translation engines based on the similarity of the source text. Non-translatable matches are also displayed.



1. 101% TM match/Context match

It is a segment stored in the TM with context information.

- 2. Forbidden TB term
- 3. Approved TB term
- 4. 100% TM match
- 5. MT match with score (QPS)

It is a suggestion provided by an MT engine with quality estimation. You can visually distinguish them as they are underlined with a dotted line.

Available QPS scores are:

- · 95 100: Excellent, post-editing likely not required
- 90 -94: Very good, limited post-editing required
- 75 89: Good, some human post-editing required
- 0 74: Poor, the output should be checked
- 6. Fuzzy TM match (anything below 100%)

It is a partial TM match, where the match level is expressed as a percentage.

7. Non-translatable match

It is a segment that should not require translation.

MT match

It is a suggestion provided by an MT engine with no QPS score. The output should be checked.

9. Subsegment match

It is a smaller part of the original text that was previously translated as a short segment.



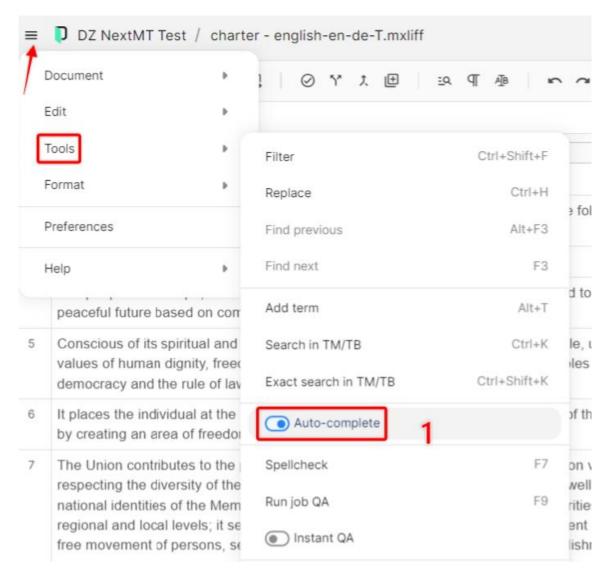
NOTE

If the project settings allow displaying of MT/NT scores, select **Preferences/Appearance** from the menu toolbar to customize the origin color of NT and MT matches.

You can use suggestions from the CAT pane to preserve consistency and style through the translated texts.

Simply double-click on the desired match to copy the text in the target segment. To speed up the process, you can also activate the Auto-complete feature:

1. Select **Tools/Auto-complete** from the menu toolbar to enable the feature.



2. As you type in the target segment, press **TAB** to insert automatically displayed suggestions from the CAT pane.



- Search in TMs and TBs (Concordance search pane and More languages pane)
 You can use the Concordance search pane to search for text in the connected TMs and TBs:
 - 1. Select the **Concordance search** tab in the side panel of the CAT editor.
 - 2. Enter text in the search field, or select a piece of text from a segment and use the keyboard shortcut Ctrl+K/Cmd+K to copy it into the search field. For exact search in quotation marks, use the Ctrl+Shift+K/Cmd+Shift+K shortcut instead.



NOTE

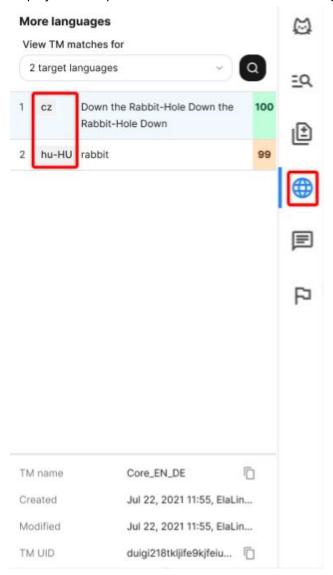
You can select the desired search direction (source \rightarrow target or target \rightarrow source) above the search field.

3. Click the **Search** icon to display the search results.

The numbers next to the results show the percentage of the TM match, i.e. to what extent the searched string matches the content of the translation unit in the TM.



For projects with more than one target language, you can also select the More languages pane to display the best possible translation matches for all target languages in the project.

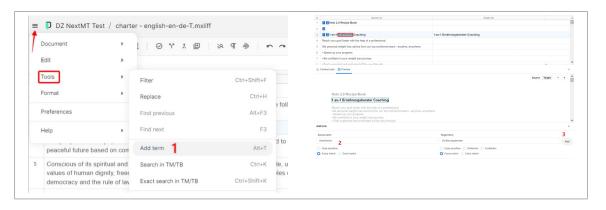


It is especially useful if you are fluent in multiple languages and want to ensure translation consistency across different language versions.

· Add terms to TBs

You can add new terms to the project TBs to ensure translation consistency, if the TB is assigned in the *Write* mode. Adding terms is particularly useful when you encounter a term frequently used in the source text.

- 1. Press Alt+T/Opt+T or select Tools/Add term in the menu toolbar to open the Add Term section.
- 2. Specify the source and target terms by either:
 - Entering them manually in the relevant fields.
 - Selecting the source or target term from the segment, and pressing Alt+T/Opt+T.
- 3. Click on Add to save the term.





NOTE

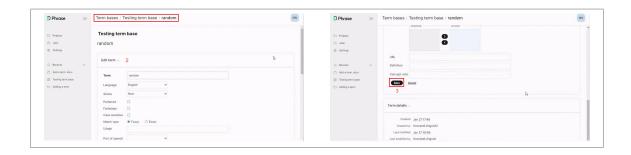
By default, all unverified terms are added as *new* unless you have been granted appropriate rights by a project manager. If you have relevant permissions, all terms added by you will be automatically set as *approved*.

If needed, you can also edit both the source and target of new terms you added:

1. In the CAT pane, select the desired TB term and click on **Edit source term** or **Edit target term**.



- 2. In the term base page, edit the term or add any necessary information.
- 3. Click **Save** to apply the changes.





NOTE

If you have been granted appropriate rights by a project manager, you can also edit approved terms or change the status of a term.

Useful articles on Phrase Help Center

You can find additional information in the following articles:

- · CAT editor
- CAT pane
- · Auto-complete
- Repetitions
- Concordance search pane
- More languages pane
- In-context preview
- Segments
- Tags
- Editor keyboard shortcuts
- Term bases
- Translation memories
- Filtering

Review and Finalize Translations

Run QA checks

Before completing a job, you should perform automatic checks on your translations to identify any potential issues or errors.

The QA process helps identify segments that may contain issues such as incorrect terminology, wrong numbers, missing tags, different formatting, and other similar problems.

- · Run QA check on all translated segments
 - 1. Select the QA tab.
 - 2. Click on Run all checks or press F9 to list QA issues detected on the translation segments.



TIP

If you wish to display only certain types of QA issues in the list, click on the dropdown arrow next to **Run all checks** and select the desired issues to filter.

- 3. Edit the relevant segment to fix QA issues that cannot be ignored.
- Confirm the edited segment.
 Fixed QA issues will disappear from the list.
- 5. If you spot irrelevant QA issues, select **Ignore** in the corresponding row to ignore them.

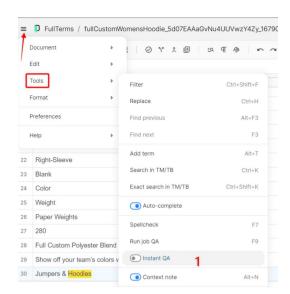




NOTE

The option to ignore minor issues must be enabled by project managers.

- Optionally, you can also ignore QA issues in bulk.
 Select multiple issues while pressing Shift or Ctrl/Cmd, then click Ignore.
- 7. Repeat the process until the QA pane shows no results.
- · Run QA check while translating
 - 1. Select Tools/Instant QA to enable instant QA check.
 - 2. Check out the QA pane for any QA issues reported after confirming each segment.





- 3. Fix or ignore QA issues in the segment as described in the previous procedure.
- 4. Repeat the process until the QA pane shows no results.



NOTE

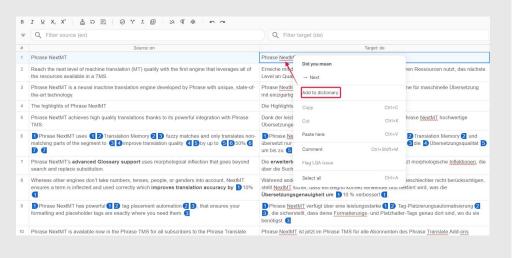
Project managers can enforce Instant QA on a project level.

- · Use spellchecker
 - Select Tools/Spellcheck from the menu toolbar or press F7.
 - 2. In the QA pane, check reported spelling issues.
 - Edit the relevant segment to fix spelling issues.



TIP

If you think the original spelling is correct, right-click an underlined word and select **Add to dictionary** from the context menu. The word will not be highlighted in other segments and will be ignored during the QA spellcheck.



4. Confirm the edited segment.

Fixed QA issues will disappear from the list.



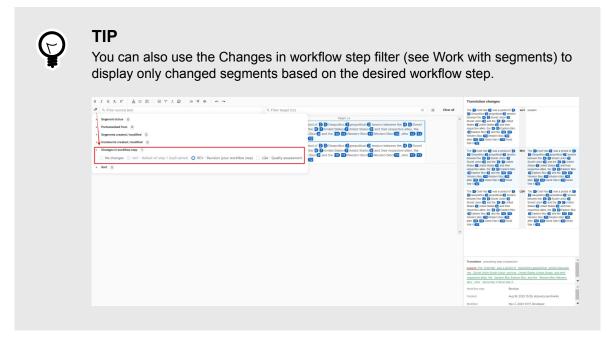
Spellcheck is also run automatically in the real time for each segment. Words detected as spelling issues will be underlined as you type in the text.

Track translation changes (Translation changes pane)

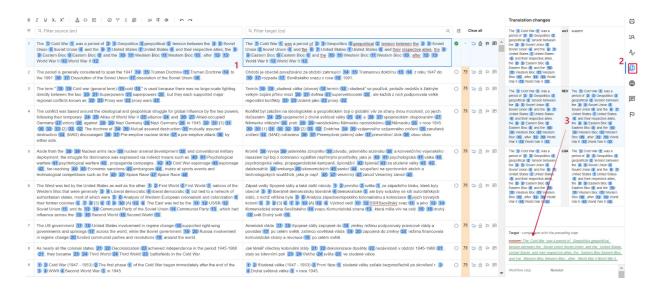
The Translation changes pane is only available when you have been assigned a linguistic task in a process that involves more than one workflow step (e.g. translation and revision).

It allows you to view and track the history of segment changes across the workflow steps.

- 1. Select a specific segment.
- Click on the Translation changes tab to compare different versions of the segment across workflow steps.
- 3. Select the Revision version to check any changes made by the reviewer.



The previous solution is crossed out, while the reviewer's changes are highlighted in green.



Complete and/or reject jobs

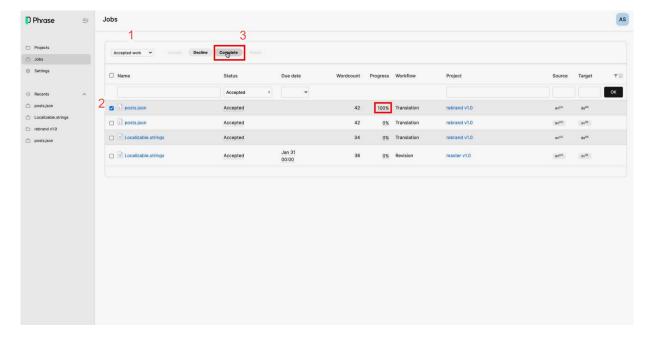
Once you finish your linguistic task, you can deliver the job by setting its status to completed.



NOTE

It might not be possible to set a job as completed if there are unresolved QA warnings.

- 1. Select **Accepted work** at the top of the Jobs page to view only assigned jobs that have been accepted.
- 2. Select one or multiple jobs.
- Click on the Complete button to complete the selected job(s).
 Completed jobs will be removed from the list and you will no longer be able to edit them.



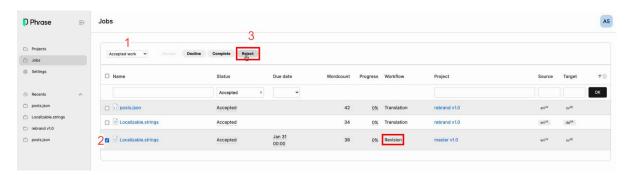
· CAT desktop editor

Before completing a job, you need to upload the translation to the server to ensure your latest changes are saved.

- 1. In the editor, select **Document/Upload to server** from the menu toolbar.
- 2. In the Jobs page, select **Accepted work** at the top to view only assigned jobs that have been accepted.
- 3. Select the desired job(s).
- 4. Click on the **Complete** button to complete the selected job(s). Completed jobs will be removed from the list and you will no longer be able to edit them.
- · Reject revision job

If you have been assigned a revision task, you can reject the job whenever the translation does not meet expected quality standards.

- Select Accepted work at the top of the Jobs page to view only assigned jobs that have been accepted.
- 2. Select one or multiple jobs.
- Click on the Reject button to reject the selected job(s).
 Rejected jobs will be sent back to the previous workflow step (i.e. translation).





NOTE

You need to be granted special permissions by the project manager to reject jobs.

Useful articles on Phrase Help center

You can find additional information in the following articles:

- · Quality assurance pane QA
- Spellchecker
- Workflow
- · Translation changes pane
- · Tracking changes