smartQuery 3.5

Testing Guide
1 Typical Query Workflow

This chapter guides you through a typical query workflow starting with the translator, passing through the project manager, to the client and all the way back.
2 Test server access

For testing, feel free to use the Kaleidoscope test server. You can connect to it using the following login data:

- smartquery.kaleidoscope.at
- User name and password for translator: Translator1
- User name and password for project manager: PM1
- User name and password for client: Client1

This description will guide you through three roles. Of course any role can start any workflow. A query does not always have to start with the translator. However, we have excluded all these options here to keep the script short and clear. We have also skipped the specialist role, because it is merely an extension of the client and thus makes no difference.

Note for the login screen: If you click on the Remember me check box, you will be logged in automatically after closing and restarting your browser. This is particularly useful if you want to be directed to a specific query from an email notification (by clicking on the link contained) without having to login to smartQuery.
3 Translator: Logging a new Query

To log a new query:

a) Log into the system as translator.

b) Select the screen New query.
   - smartQuery will display the screen to log a new terminological query.

c) Fill out the defined fields for the query
   - OR -
   - Click on Other to switch to the other query screen.

d) Click on Save query.

   The query has now been sent off to the project manager or group of project managers.
4 Project Manager: Checking and assigning a Query

To check a new query:

a) Log into the system as project manager.
   - In *My view* you can now see all queries which are currently assigned to you. This includes the query you have just logged in the previous step.

b) Double click the query or click on *Edit query* next to the query.
   - *smartQuery* opens the Edit query screen. As a project manager you can enter more information to a query than the translator.

c) As an option you can also mark the checkboxes *Inform client feedback* and *Inform translator feedback*. Then you can attach this query during a feedback loop to the client and/or the translators.

d) You can now either return the query to the translator (for instance if the question was unclear), or answer the query yourself, or assign it on to a client. For the test workflow please select *Assign query*.

e) A dialog will pop up called *Assign query to the selected user*, in which you can select a specific client user or an entire group (shown in square brackets) to delegate the query to.

f) Select the respective user or group.

g) Fill out any fields you want to.

h) Click on *Assign selected user*.
   - The query is now assigned to the selected user.
5 Client: Checking and answering a Query

To check a new query:

a) Log into the system as client.
   - In My view you can now see all queries which are currently assigned to you. This includes the query you have just assigned to the client in the previous step.

b) Double click the query or click on Edit query next to the query.
   - smartQuery opens the Edit query screen. As a client you can enter less information to a query than the translator or project manager.

c) You can now either return the query to the project manager (for instance if the question was unclear), or answer the query yourself, or assign it on to a specialist. For the test workflow please select Answer to project manager.

d) The dialog box Answer query to a previous user will open. Here you can enter your answer to the field Client answer. You can also enter a note in the Note field.

e) Click on Answer to selected user.
   - The query will now be answered and is assigned to the project manager for further processing.
6 Client: Delegating a Query to a Specialist

As mentioned before, the client can delegate a query on to an additional level to a pre-defined specialists at the client side. For the test workflow you can skip this step.
7 Project Manager: Answering the query to the translator

To check the client’s answer:

a) Log into the system as project manager.
   ➔ In My view you can now see all queries which are currently assigned to you. This includes the query you have just answered in the previous step. You now also see the field Client answer and the status is set to Answered by client

b) Double click the query or click on Edit query next to the query.
   ➔ smartQuery opens the Edit query screen.

c) You can now either return the query to the translator (for instance if the answer was unclear), or return the query to the client (when the answer was unclear). You can also re-assign the query to the client or pass the answer on to the translator. For the latter option please click on Answer.

d) smartQuery will open the screen Answer query. Here you can check or edit the client’s answer. Also, you can enter your own answer in the field Project manager’s answer. This might be useful if you want to give further instructions to the translator on implementing the answer. Lastly, you can enter a Note for the query.

e) Click on Answer to selected user.
   ➔ The query will now be answered and is assigned to the translator for confirming its implementation.
8 Translator: Closing a query

To check the answer to your query:

a) Log into the system as translator.
   - In *My view* you can now see all queries which are currently assigned to you. This includes the query you have just answered in the previous step. You now also see the field *Client’s answer, PM’s answer* and the status is set to *Finalized by PM*.

b) Double click the query or click on *Edit query* next to the query.
   - smartQuery opens the Edit query screen.

c) You can now either return the query to the project manager by clicking on *Requery* (for instance if the answer was unclear), or close the query. To close the query, click on *Finalize*.
   - The query is now closed. This confirms that you have read and implemented the answer. The project manager will receive the status information that this query has been answered to your satisfaction and you have implemented it in the translation.
9 Editing Queries Off-Line

As a project manager or a client you can export selected queries as an Excel file which you can edit off-line and then import back to smartQuery.

Exporting Queries

To export a query:

- You are logged in as a client or project manager.
- Switch to Tracking View.
- Select all the filters so you can see exactly those queries which you want to export.
  Keep in mind that the export will only contain those queries which are assigned to your organization (your client).
- For this click on Export queries assigned to me.
- Next Status: You can define the status of the query AFTER re-importing it to smartQuery. You can select among None, Answer previous role, return to previous role.

The queries are exported as an MS Excel file. You can store this to your hard drive and edit it off-line.

Editing a Query in Excel

The Excel file contains all the query information in columns A to J, including the notes attached to the query so far. This information is locked in the Excel file and cannot be edited off-line. The columns K to M can be edited and thus imported back to smartQuery.

Illustration 1: The Excel File

To edit the Excel file:

a) In the column K - Next Status enter the information what should happen to the query after upload. You can select:
   - No change: This means the query remains assigned to yourself.
   - Answer to previous role: This means that the query will be set to answered and is assigned to the previous role (for instance from client to project manager).
   - Return to previous role: This means that the query will be re-assigned without answer to the previous role (for instance from client to project manager).
   - Delegate to next role: This means that the query will be assigned to the next role in the workflow (for instance from client to specialist).

b) In the column L - Message you can enter a text which will be stored as answer in the query.

c) In the column M - Note you can enter a text which will be stored as a new note in the query.

Uploading the Excel file to smartQuery

To upload the edited Excel file back to smartQuery:

a) Switch to the smartQuery screen Import.
b) Choose *Update existing query*.

c) Click on *Browse* and select the Excel file you have just edited.

d) *Import as client:* If you choose this option as a project manager, the contents entered in the Message column of the Excel sheet will be displayed as client answer. Queries assigned to the previous role will be forwarded to the translator who will realize that the answers are given by the client and not by the project manager.

e) Click on *Upload file*...

[smartQuery will update all the queries based on the information in the Excel file and will display a short statistics of what has been done.]
10 Starting a Feedback Loop

Feedback loops are special types of queries in which project managers or clients can actively inform the translator team or the client about certain query results. See also Feedback-Loops.

To launch a feedback query:

a) Log into the system as project manager.
b) Switch to the New feedback screen and then select Feedback loop.
c) Enter the corresponding information into the fields.
d) Check Inform client feedback if you want to send the feedback to the client.
e) Check Inform translator feedback if you want to send the feedback to the translator.
f) Open the list of linked queries.
   ⇒ This list shows all queries of the current project and language combination which have been marked relevant as either client or translator relevant.
   ⇒ Queries which have been included in previous feedback loops are by default not listed here. However if you want to attach these queries also to the current feedback, then click on Also show queries already in feedback loops and select the ones you want to send again.
g) Select all queries you want to attach by checking the checkbox on the right-hand side of the query.
h) Click on Save query.
   ⇒ The feedback is sent to the respective users.

The translators or clients can now see the feedback in the feedback area of My view. They can display the feedback and mark it as read.

You can always track these feedback queries in the Tracking View under Feedback. This will show you, how many target users have marked the feedback as read.