

# CETRA's Resource Portal Translation

Plunet Business Manager

## CETRA's Resource Portal – Plunet

The intention of this guide is to provide general information about CETRA's resource portal (Plunet) as well as detailed instructions on how to accept, deliver and invoice projects using Plunet.

The resource portal offers many beneficial features:

- Bypasses email spam filters
- Bypasses email file size restrictions
- Enables the secure transfer of sensitive files
- Organizes CETRA jobs using an informative dashboard
- Offers reporting features for active and past jobs
- Reduces invoicing discrepancies
- Speeds up invoicing process

## Browser Requirements and the Login Screen

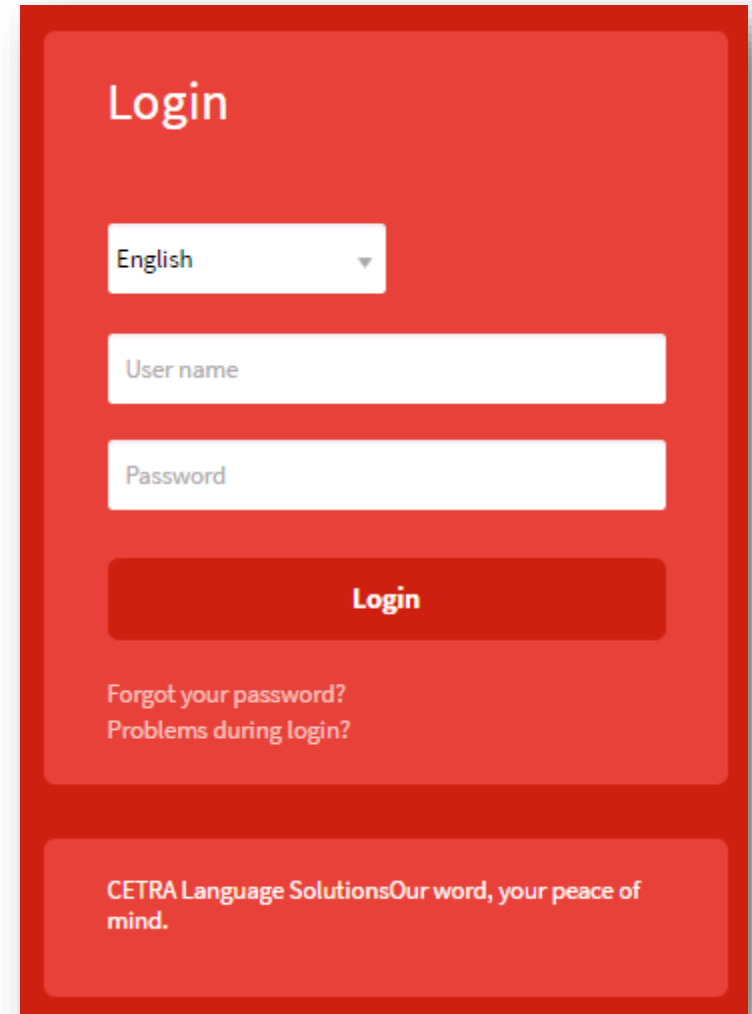
### Browser Requirements

- Microsoft Edge
- Google Chrome
- Mozilla Firefox

\*\*\* Latest Versions Supported \*\*\*


After three failed login attempts, your account will be locked for 24 hours. If this happens to you, you can unlock your account by one of the two methods below:

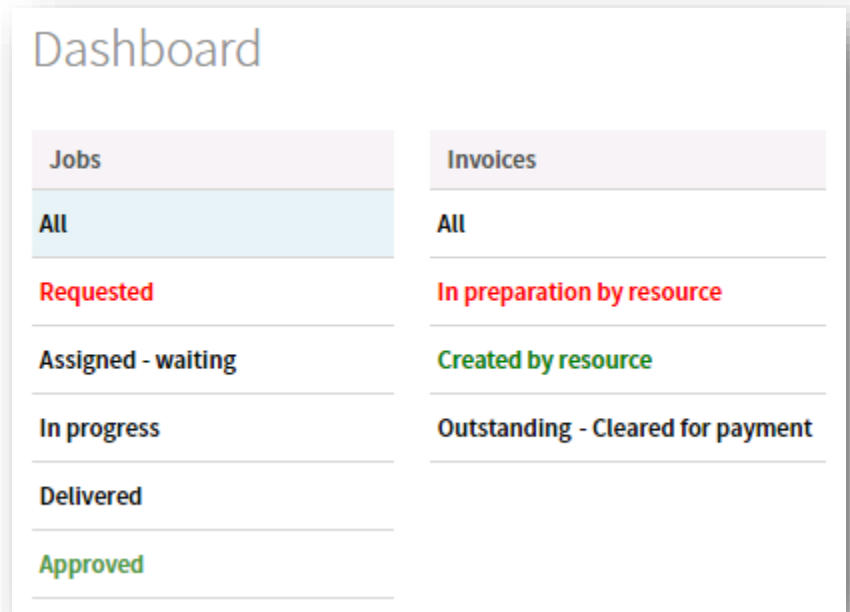
1. Recover your password using the “Forgot your password?” link. In order to recover your password, you will need to know your username. An email with instructions will be sent to the address on file.
2. If you cannot remember your username, send an email to [michael.harter@cetra.com](mailto:michael.harter@cetra.com) to request your login information.



The screenshot shows a login interface with a red background. At the top, the word "Login" is displayed in white. Below it is a language selection dropdown menu currently set to "English". There are two white input fields for "User name" and "Password". A red "Login" button is positioned below the password field. At the bottom of the form, there are two links: "Forgot your password?" and "Problems during login?". A footer at the very bottom of the page contains the text "CETRA Language Solutions Our word, your peace of mind."

## Dashboard

- The dashboard in Plunet serves as the central hub for information about all the active jobs you are working on.
- Each of the areas in the example image to the right will be explained in detail later within this guide.
- The dashboard is accessed by clicking on the  icon.



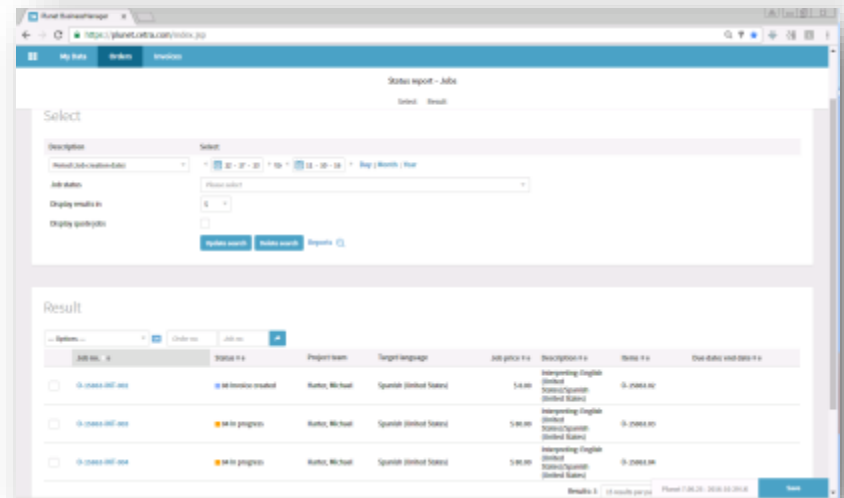
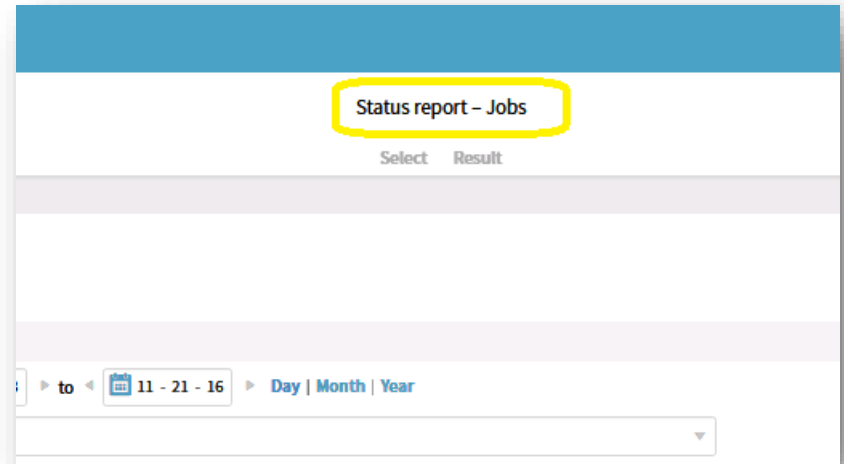
The screenshot shows a dashboard with two main sections: 'Jobs' and 'Invoices'. Each section has a list of items with horizontal lines separating them. The 'Jobs' section includes 'All', 'Requested', 'Assigned - waiting', 'In progress', 'Delivered', and 'Approved'. The 'Invoices' section includes 'All', 'In preparation by resource', 'Created by resource', and 'Outstanding - Cleared for payment'.

Jobs	Invoices
All	All
Requested	In preparation by resource
Assigned - waiting	Created by resource
In progress	Outstanding - Cleared for payment
Delivered	
Approved	

## Orders > Status Report - Jobs

Under *Orders > Status Report – Jobs*, you can run status reports.


- The search criteria can be filtered by date ranges and job status.
- The status report will provide you information on current and previous jobs.
- Jobs can be directly accessed in the results area.

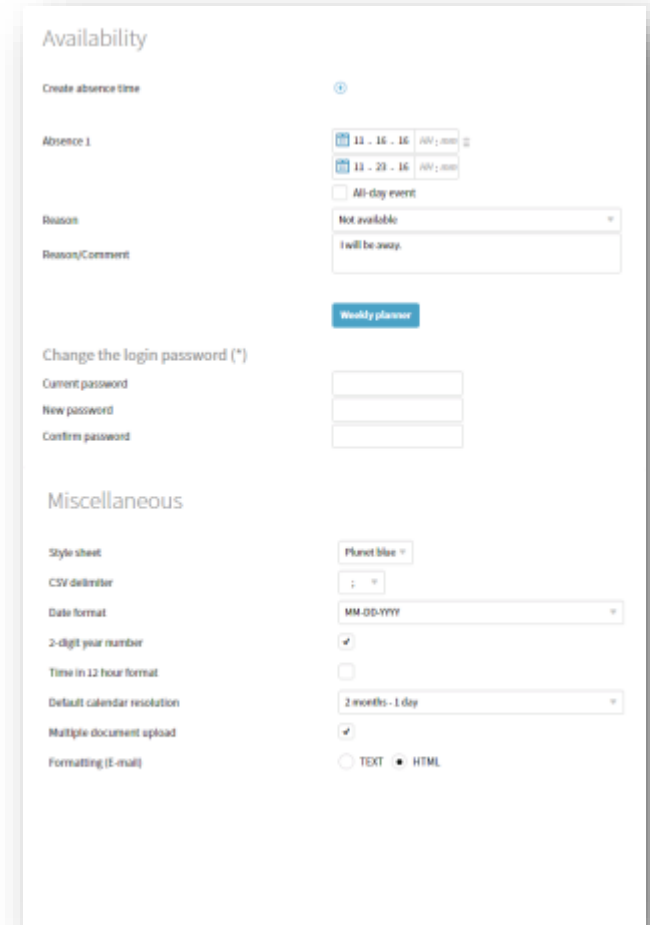


# Settings

The settings area allows you to customize your Plunet experience, change your password and create absences.

The Settings page is accessed by the *Dashboard icon > Settings*.

- Absence
  - To create an absence, select the  icon, enter in a start & end date/time, reason and optional description. Once this is entered, click the Save button in the lower left.
    - If you are unavailable for a full single day, you must check All-Day Event.
  - Adding these will inform project managers that you are not available and will not be able to accept new work during the selected timeframe.



The screenshot shows the 'Availability' settings page. It includes sections for 'Absence 1' with date/time pickers and an 'All-day event' checkbox, a 'Reason' dropdown menu, and a 'Reason/Comment' text area. Below this is a 'Weekly planner' button. The 'Change the login password (\*)' section has three input fields for current, new, and confirm passwords. The 'Miscellaneous' section contains several settings: 'Style sheet' (Plunet blue), 'CSV delimiter' (comma), 'Date format' (MM-DD-YYYY), '2-digit year number' (checked), 'Time in 12 hour format' (unchecked), 'Default calendar resolution' (2 months - 1 day), 'Multiple document upload' (checked), and 'Formatting (E-mail)' (HTML selected).

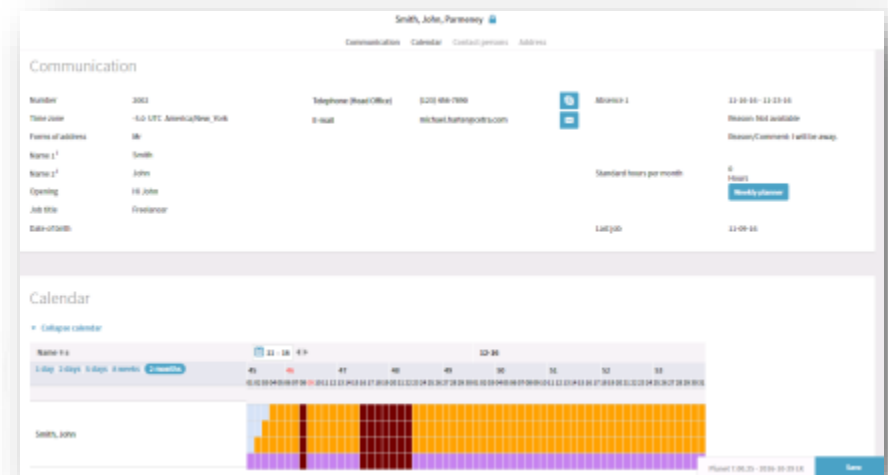
# General Information – My Data

The My Data section contains general contact information, calendar and address information. This information is initially entered in by CETRA's Global Resource Manager.

- Under Communication and Calendar, much of this can be updated. If you move, change your phone number, change your last name, etc., update the information stored here.

**Note:** Before you can edit this, you need to unlock the record. To do so, click on the lock icon at the top of the record.

- Calendar – this displays a summary of the current jobs you are working on and status of each job. Additional information is displayed if you hover over this with your mouse. This also displays any Absent times you entered.
  - Absences can also be entered on this screen. To do so you must first unlock the record.



The screenshot displays the 'My Data' interface for a user named 'Smith, John, Parmentier'. It is divided into two main sections: 'Communication' and 'Calendar'.

**Communication Section:**

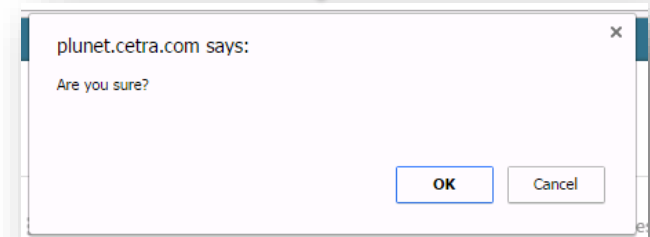
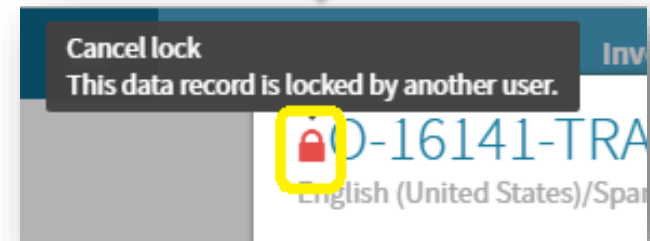
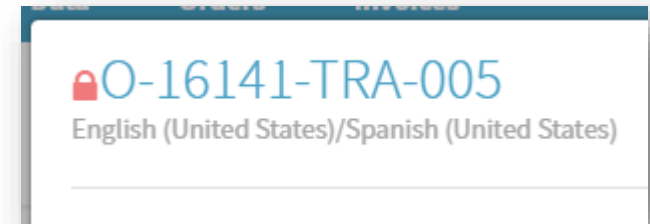
- Number:** 2002
- Telephone (Work Office):** 512 854 7596
- Mobile 1:** 512 854 7596
- Time zone:** -5:00 UTC America/New\_York
- Time out:** 8:00
- Michael.huttinger@cs.com**
- Name 1:** Smith
- Name 2:** John
- Standard hours per month:** 0
- Opening:** FR John
- Job title:** Coordinator
- State of birth:** Louisiana
- Last job:** 11-09-10

**Calendar Section:**

- Calendar:** Displays a summary of current jobs and status. The calendar shows a grid of days with colored bars representing job status (e.g., yellow for working, red for absent).
- Legend:** Includes 'Collaps calendar', 'Name P-0', and 'L-00'.
- Navigation:** Includes 'L-00', 'L-01', 'L-02', 'L-03', 'L-04', 'L-05', 'L-06', 'L-07', 'L-08', 'L-09', 'L-10', 'L-11', 'L-12', 'L-13', 'L-14', 'L-15', 'L-16', 'L-17', 'L-18', 'L-19', 'L-20', 'L-21', 'L-22', 'L-23', 'L-24', 'L-25', 'L-26', 'L-27', 'L-28', 'L-29', 'L-30', 'L-31'.

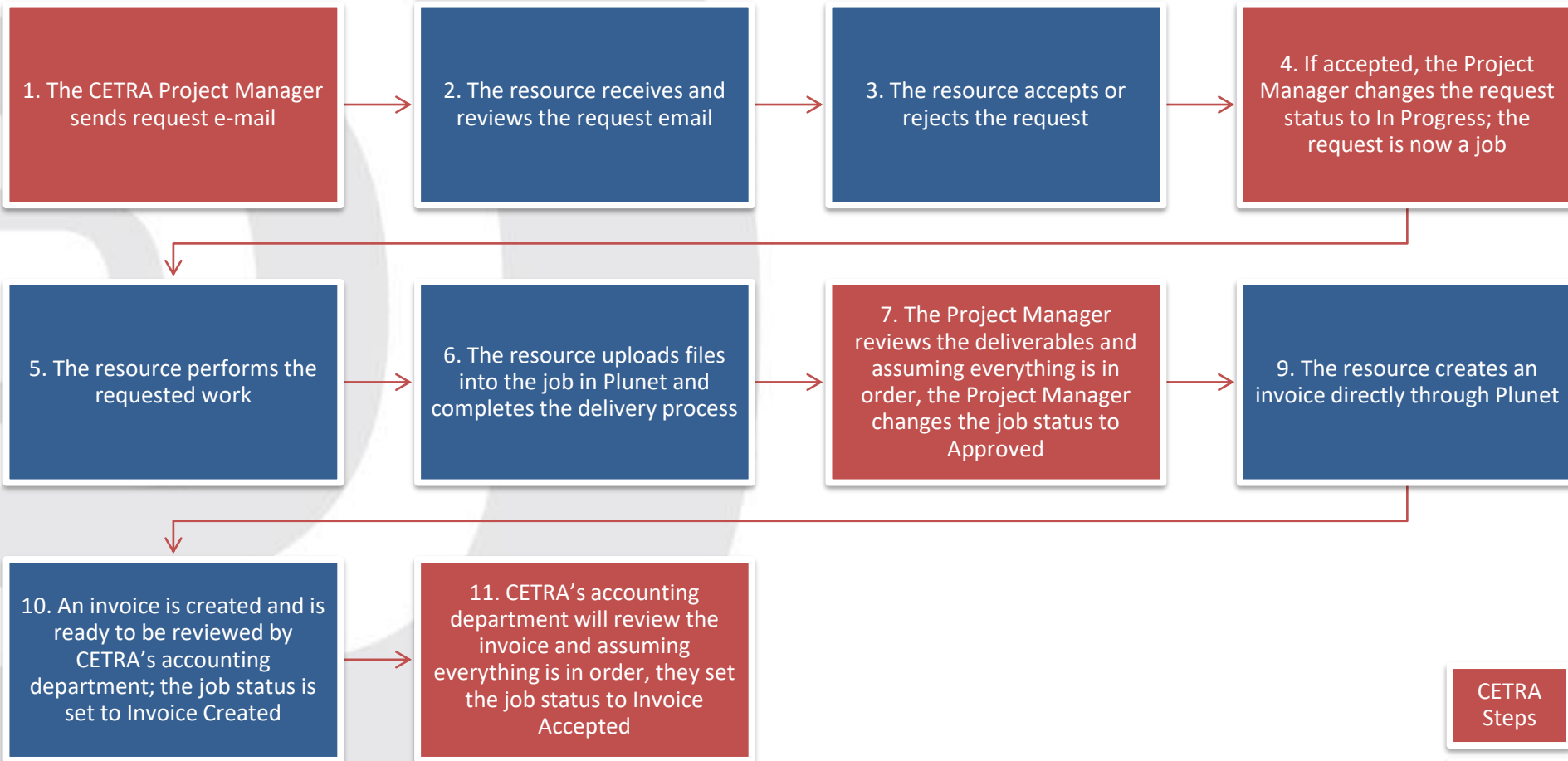
## Locked Records

- Job records and My Data can only be accessed by one user at a time. Occasionally you will see a red lock icon when these records are open by another user. Before you can make any changes (for example, job delivery or updating contact information), you will need to unlock the record.
- To unlock the record just click on the lock icon and select OK. The page will refresh and you will have the ability to modify the record.





# Resource Portal Workflow – from request to invoice

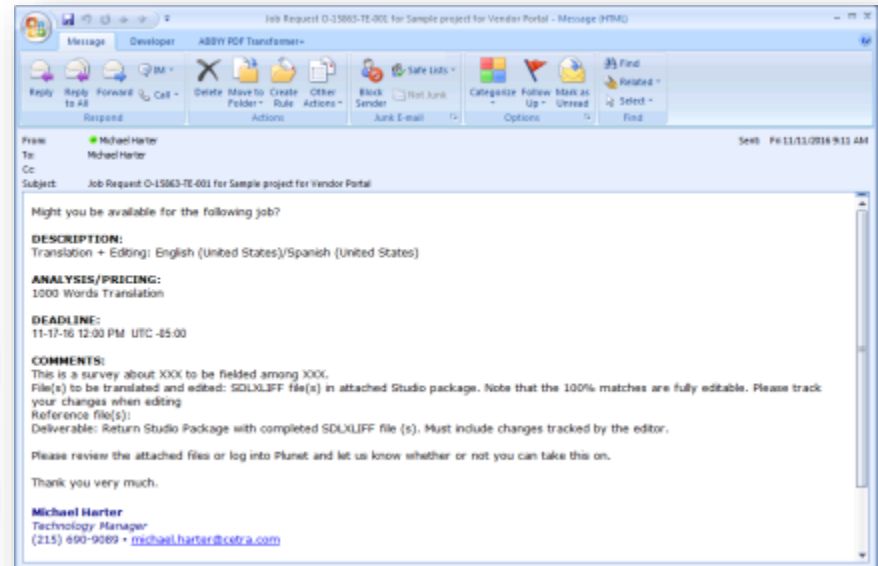


CETRA Steps

Resource Steps

## Steps 1, 2, & 3: Receiving the request and logging into Plunet

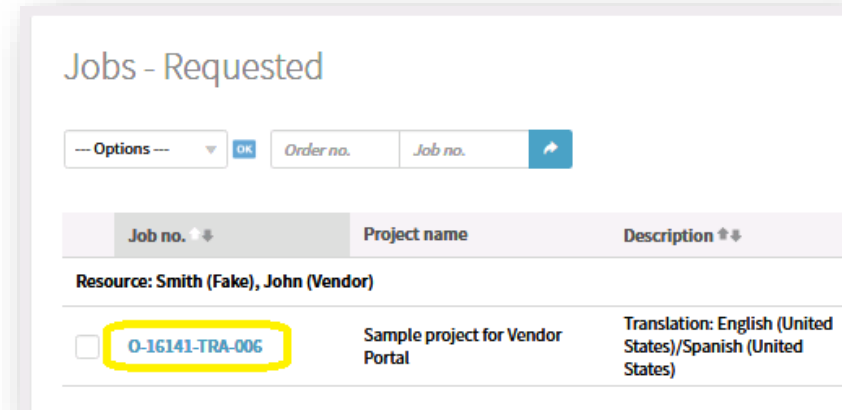
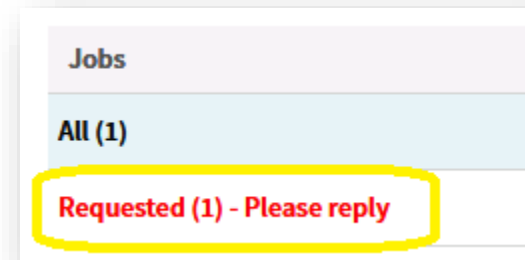
1. You will receive a request via e-mail from a CETRA project manager. The email will contain many details about the project.
2. Review the request email for information about the job.
3. Follow the instructions within the email to accept or reject the job using the provided links or by logging into Plunet.



## Step 3: Reviewing the request & files, and confirming the job

If the job was accepted using the provided links in the email, you will skip to step 4.

- 3.1 - If you choose to log into Plunet to accept the job, the initial screen you will see is the Dashboard.
- 3.2 On the dashboard, you will see a “Requested” category. If you have a request, you will see a number within the parentheses.
- 3.3 Click on the Requested link and a list of your requested jobs will be displayed.
- 3.4 If you click on the job, a new window with full job details will be displayed.



## Step 3: Reviewing the request & files, and confirming the job

The job details page supplies all of the information you need to review the job.

### 3.5 Summary View Tab – each area should be reviewed with every job request

- a. Your CETRA contact, due date and total word count is displayed at the top of the screen.
- b. The **Details** section provides general information about the job.
- c. The **Work Instructions** section provides job specific instructions supplied by the CETRA PM.
- d. The **Source Data** section contains the files uploaded to Plunet by the CETRA PM. The files can be downloaded separately or as a Zip file ( [Download ZIP archive](#) ).\*
- e. The **Prices** tab provides a complete quantity breakdown of word counts, hourly rates, etc.
  - You will notice that all rates are initially 0 for the Unit Price. This will be updated with your rates that we have on file after the job is accepted.



### 3.6. **Confirm Availability** – to confirm if you can or cannot accept the job, you must use this section. You can write in a message and this will be delivered to the CETRA PM. The job will not be accessible from your dashboard until the PM confirms the acceptance.

**Note:** It is very important this step is completed. If this is not completed, the CETRA PM will not know if you accepted or declined the job. This may result in the PM reassigning the job to another resource.

*An example screenshot is on the next page.*

\* A download link is also available in the request email.

## Job information

Contact person for job	Harter, Michael	Due date	11-17-16 12:00	Prices	0.00 \$
Files	 			Gross quantity	1000 Words
				Net quantity	1000 Words

**SUMMARY VIEW**
**PRICES**

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### Details

Job no.	O-15863-TE-001
Job types	Translation + Editing
Creation date	11-11-16
Company code (invoice)	CETRA US
Description	Translation + Editing: English (United States)/Spanish (United States)
Languages	English (United States) → Spanish (United States)

### Work instructions

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Comment

This is a survey about XXX to be fielded among XXX. File(s) to be translated and edited: SDLXLIFF file(s) in attached Studio package. Note that the 100% matches are fully editable. Please track your changes when editing  
Reference file(s):  
Deliverable: Return Studio Package with completed SDLXLIFF file (s). Must include changes tracked by the editor.

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### Source data

FOLDER

 Source data 

[Download ZIP archive](#)

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### Confirm availability

Status

Available  Conditional acceptance

Not available

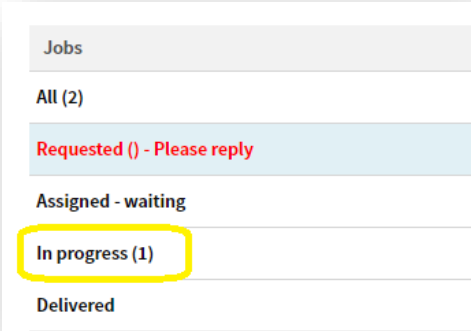
Message to project manager (Optional)

[Send](#)

## Steps 4 & 5: Proceeding with the job

4. If accepted, the CETRA PM will issue a Purchase Order (or work document as needed) and change the job from Requested to In Progress. You will also notice that the job now appears in the In Progress section on your dashboard.
5. Proceed with the job as instructed.

If any questions occur while the job is in progress, please contact the CETRA project manager by replying to the initial request email. Similarly, if the CETRA project manager needs to contact you about the project, they will contact you via email.



Jobs
All (2)
Requested (0) - Please reply
Assigned - waiting
<b>In progress (1)</b>
Delivered

## Steps 6 & 7: File delivery and approval

6. After the job is assigned to you, a new Delivery tab will appear on the Job Information screen. When you have completed your work and are ready for delivery:
  - a. Submit your work using the “Upload files” button. (If your job does not require the delivery of files, you can skip this step.)
  - b. Complete the “Work Instructions” checklist. (This may not appear in all jobs.)
  - c. Add a note to the delivery if necessary.
  - d. Select Partial Delivery or Final Delivery. Selecting Final Delivery will move the job into the Delivered category and indicate that the work is complete. (Partial Delivery should only be used when you are submitting some, but not all of the deliverables.)
7. Once the CETRA PM reviews the files and agrees the work is complete, they will mark the job as Approved.

***An example screenshot for Step 6 is on the next page.***

SUMMARY VIEW

PRICES

**DELIVERY**

Deliver data to server

FOLDER

 Target data ▾

0

Upload files

Check work instructions

WORK INSTRUCTIONS

 NOT COMPLETED

 PLEASE SELECT

 COMPLETED

 Run SpellCheck

 Translate and Proofread All Match Ranges

Send delivery

Note to be included with delivery

Partial delivery

Final delivery

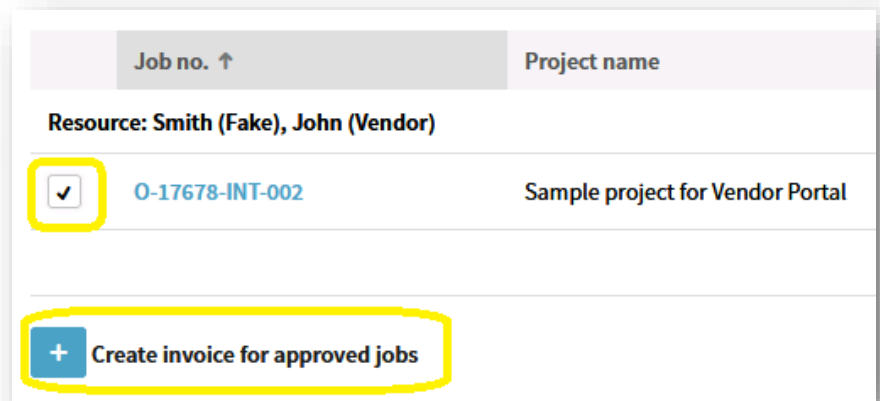
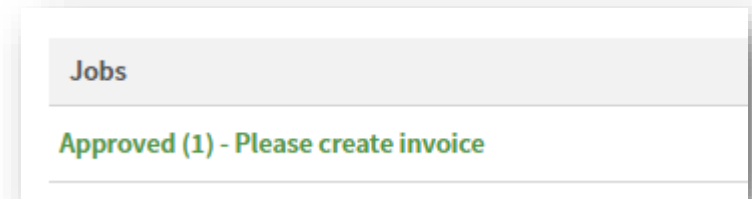


## Steps 8, 9 & 10: Submitting jobs to invoicing

8.1 After the CETRA PM approves the job, the job can be invoiced. To submit the job to invoicing, select the Approved category.

8.2 A list of jobs that can be invoiced will appear. Select each job you are ready to invoice and click on “Create invoice for approved jobs”.

**Note:** If you are creating multiple invoices at once, Plunet will automatically separate the jobs based on the company that issued the job. This information can be found under the Details section in the job information screen.



## Steps 8, 9 & 10: Submitting jobs to invoicing

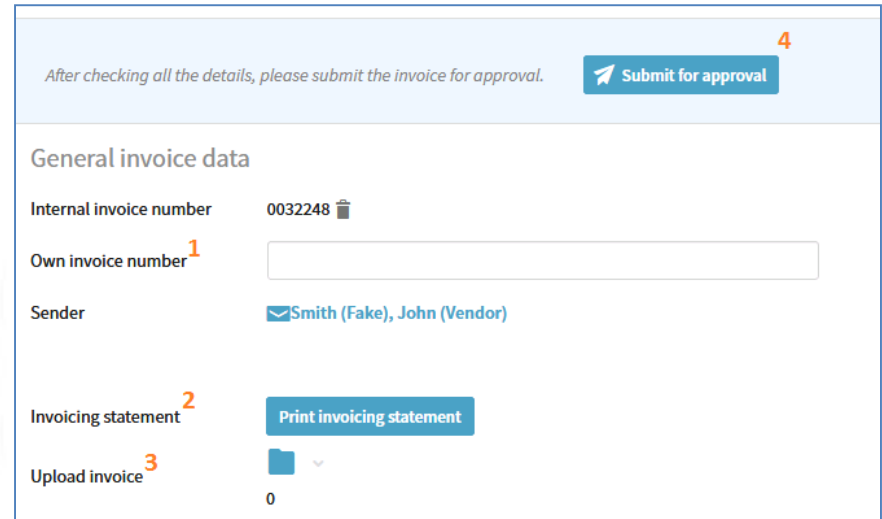
Before your invoice is submitted to the accounting department, you need to review the invoice information and submit it for approval.

### 9. Preparing your invoice

- 1) If you have your own internal invoice number, you may reference it here. This is an optional field.
- 2) Once you have reviewed the invoice and have not found discrepancies, this button will create the invoice.
- 3) If you have your own internal invoicing software, you may upload a copy of your invoice here for reference.
  - This is required for all European vendors to comply with EU invoicing regulations.
- 4) This is the final step. Selecting this button will send a copy of the created invoice to CETRA's accounting department.

**Note:** Invoices created using Plunet take priority over uploaded invoices.

**Note:** Do not backdate the invoice as doing so will cause a delay in having your invoice processed.



The screenshot shows a web interface for submitting an invoice. At the top, there is a light blue header with the text "After checking all the details, please submit the invoice for approval." and a blue button labeled "Submit for approval" with a paper plane icon and a small orange number "4" above it. Below the header is a section titled "General invoice data". It contains several fields: "Internal invoice number" with the value "0032248" and a trash icon; "Own invoice number" with a small orange number "1" above it and an empty text input field; "Sender" with a blue envelope icon and the text "Smith (Fake), John (Vendor)"; "Invoicing statement" with a small orange number "2" above it and a blue button labeled "Print invoicing statement"; and "Upload invoice" with a small orange number "3" above it, a blue folder icon, a dropdown arrow, and the number "0".

# Contact Information

- If you have technical questions, contact [michael.harter@cetra.com](mailto:michael.harter@cetra.com).
  - **Note:** From time-to-time Plunet is brought down to perform regular maintenance. Maintenance typically lasts under 30 minutes. If you cannot immediately access Plunet, please wait a few moments and try again. If after 30 minutes you cannot access Plunet, contact [michael.harter@cetra.com](mailto:michael.harter@cetra.com).
- If you need your login information resent, or have questions about updating your contact details under “My Data” or entering in absence information or general information, contact [simon.nazir@cetra.com](mailto:simon.nazir@cetra.com).
- If you have questions about job information or pricing information, contact the PM that issued the job.
- If you have general questions about invoicing, contact:
  - [invoice@cetra.com](mailto:invoice@cetra.com) for jobs issued from our offices in the US and Korea
  - [invoice-ireland@cetra.com](mailto:invoice-ireland@cetra.com) for jobs issued from our office in Ireland.