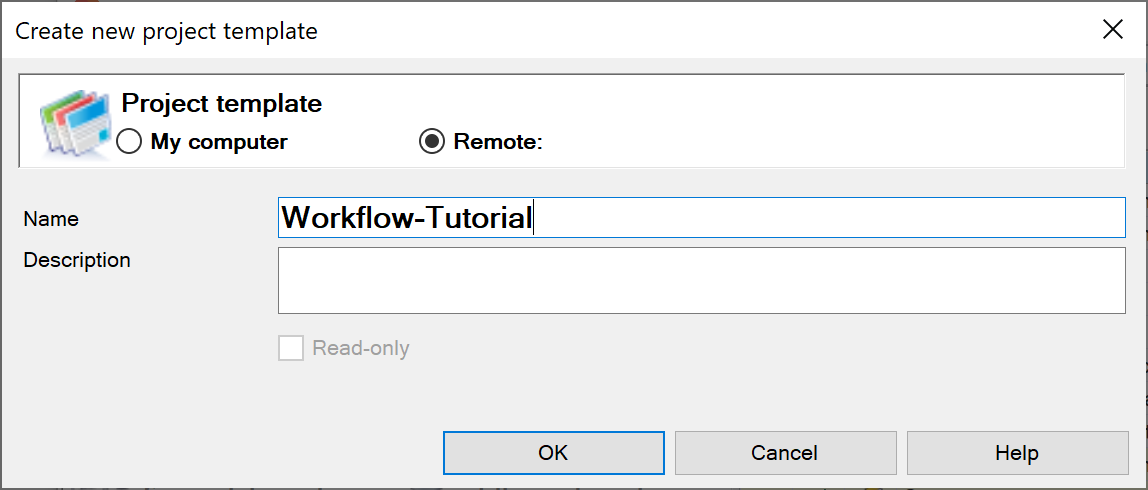
# Steps to creating the project template used in this tutorial

These are the steps involved in creating the project template used in this tutorial

# **Create new project template**

To create a new project template, go to **Resource Console**. In the **Resource Console**, click the **Project templates** category, and under the template list, click **Create new**.



Type “Workflow-Tutorial” as the name and select **Remote** to create the template on your memoQ server.

Click **OK**.

This will create a project template.

# **Edit project template**

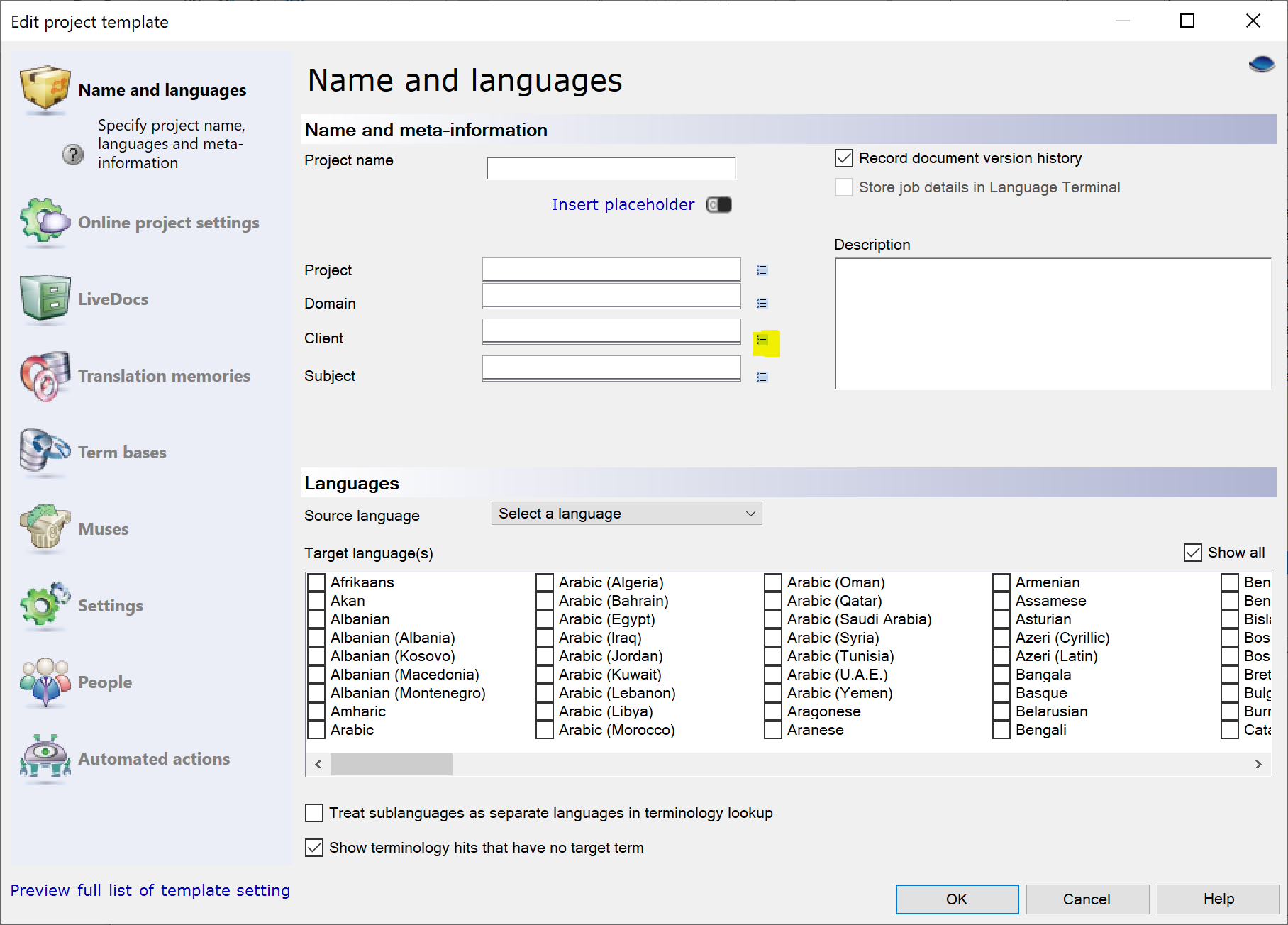
Select the project template you have just created.

Click **Edit**.

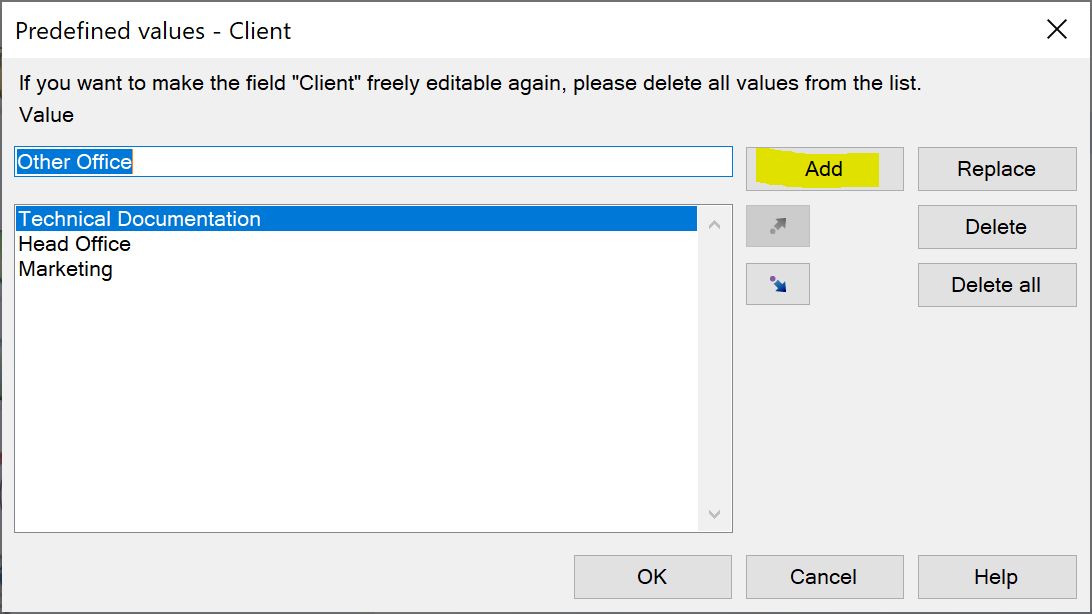
If you need to edit one of the default project templates which come installed with memoQ, clone it first.

**Pre-defined lists**

To create a pre-defined client list, select the icon next to the **Client** text box.



This will open a dialog where you can add items to a pre-defined list.



Type the text in the **Value** text box, and click **Add**.

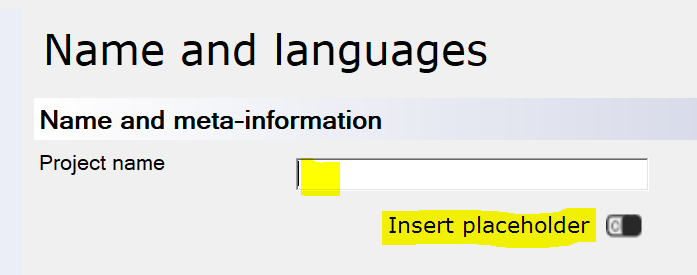
Add the following to the **Client** pre-defined list: Marketing, Technical Documentation, Head Office, Other Office. Click **OK**.

Add the following to the **Domain** pre-defined list: Software, User Assistance, Marketing, Administration, Ad Hoc. Click **OK**.

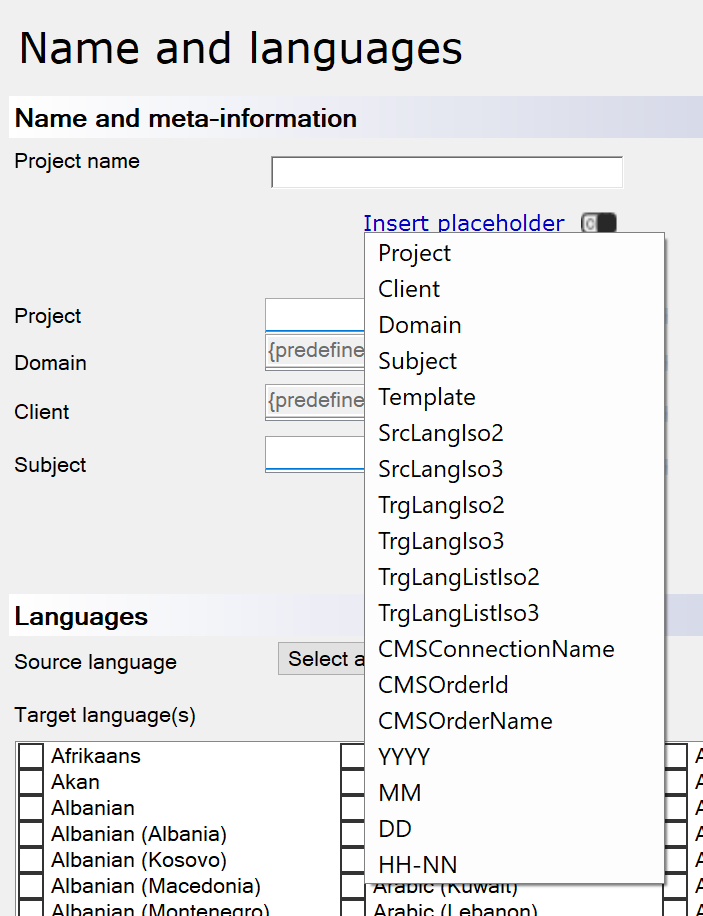
**Placeholders**

We want to enforce a naming convention for the name of the project.

Place the cursor at the start of the **Project name** text box.



Click the **Insert placeholder** link.



You will see a list of placeholders.

Select **Client**, then **Domain**, **Subject**, **Date (DD)**, **Month (MM)**, and **Year (YYYY)**.

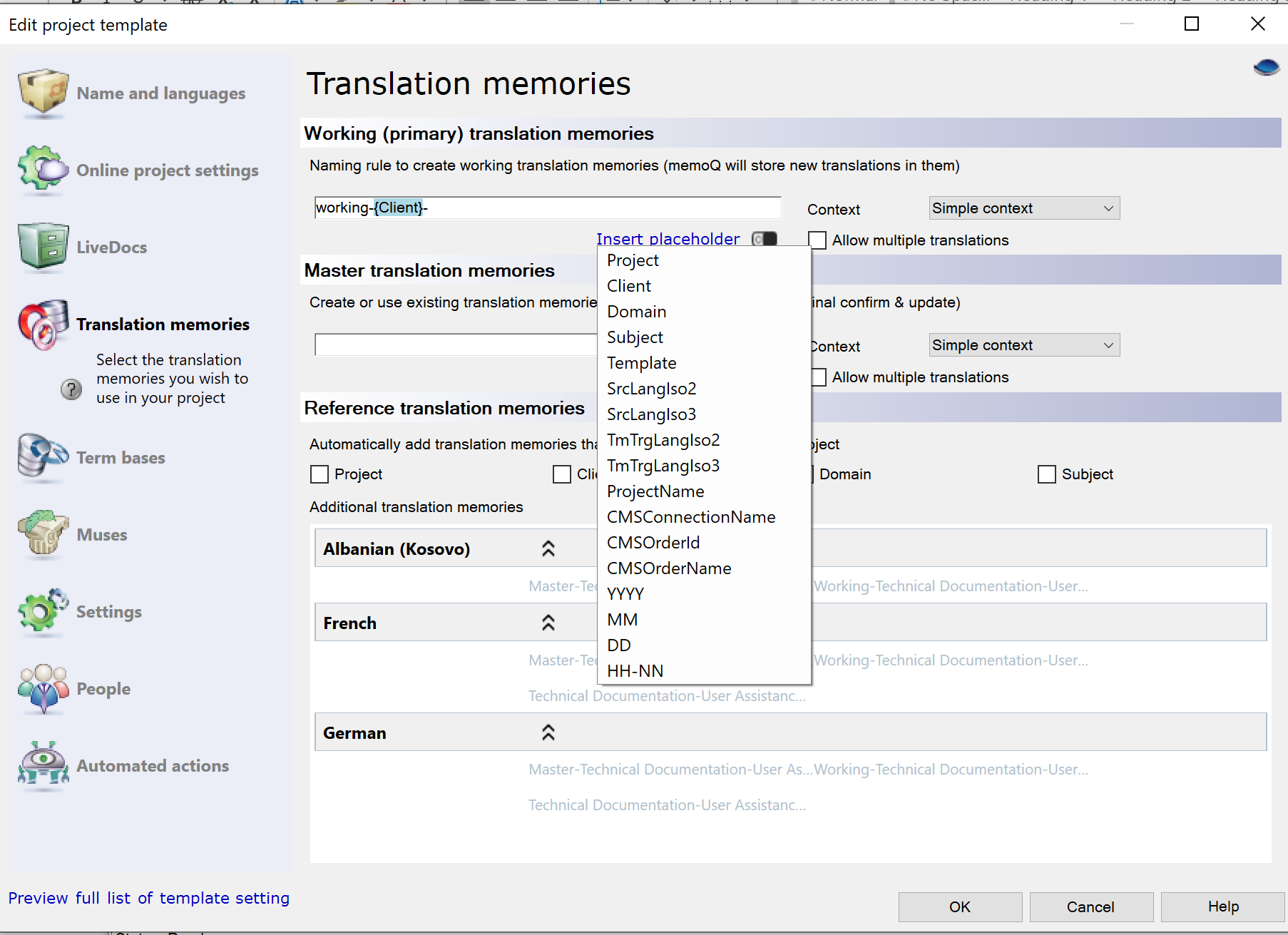
{Client}-{Domain}-{Subject}-{DD}-{MM}-{YYYY}-

Remove the final hyphen after (YYYY).

# **Translation memory and other resources**

Go to the **Translation memories** tab. We are again going to use placeholders to enforce a naming convention.

In the name of the working TM, type “Working-“



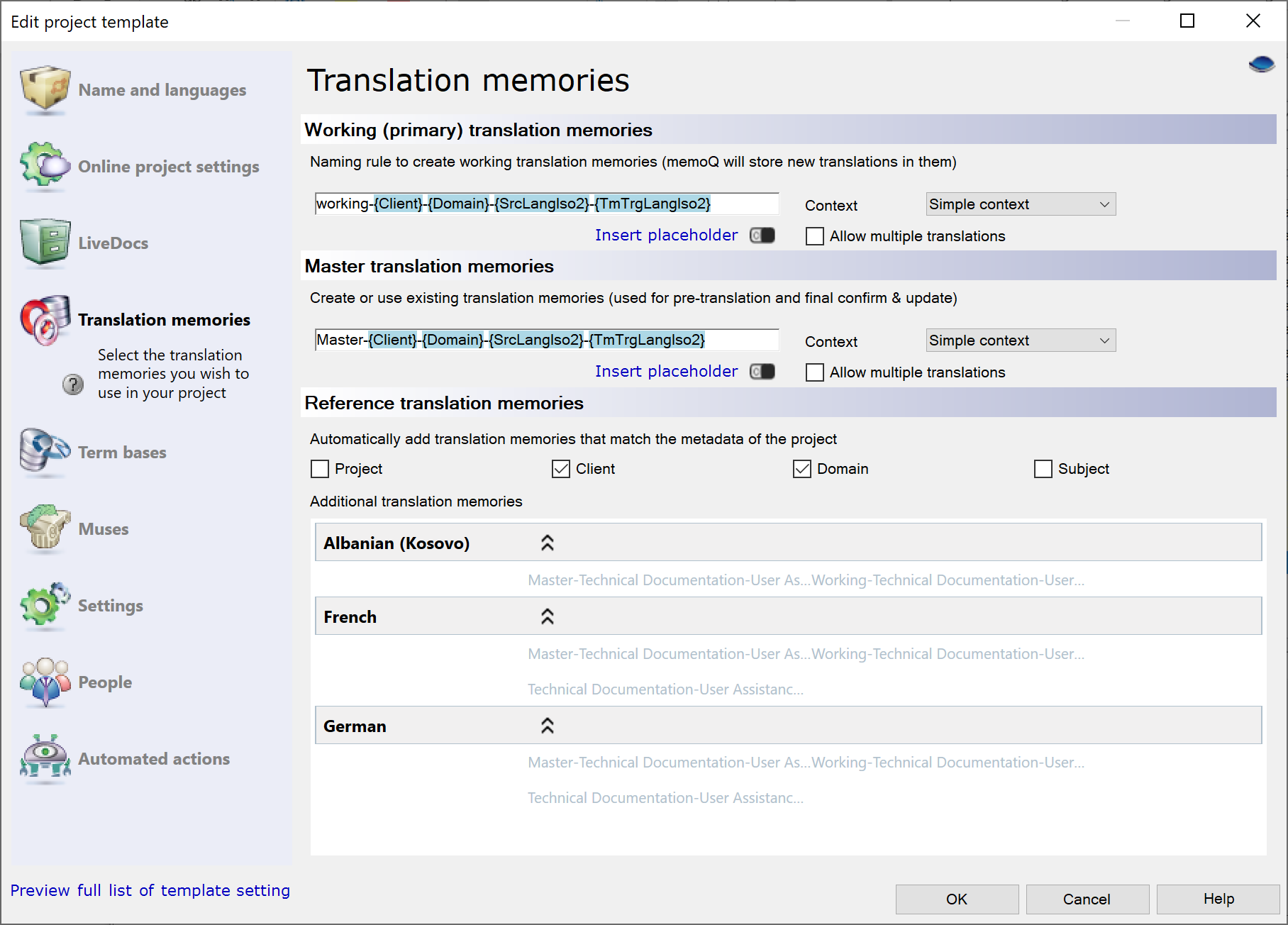
Then, using the placeholders, add **Client**, **Domain**, **SrcLangIso2**, and **TmTrgLangIso2**.

Remove the final hyphen.

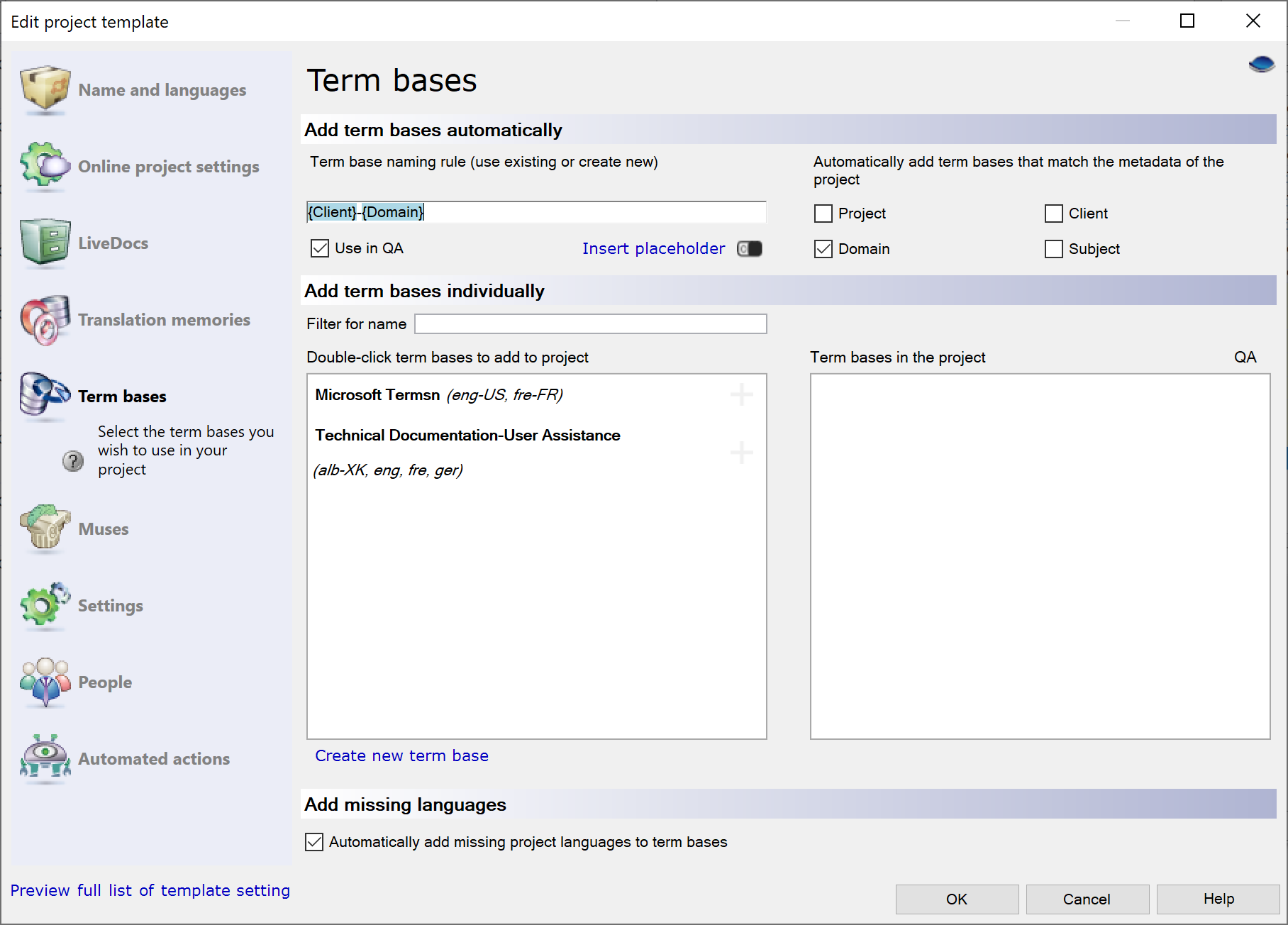
working-{Client}-{Domain}-{SrcLangIso2}-{TmTrgLangIso2}

Copy and paste this into the **Master translation memories** text box. Delete the word “**working**”, and add “**master**”.

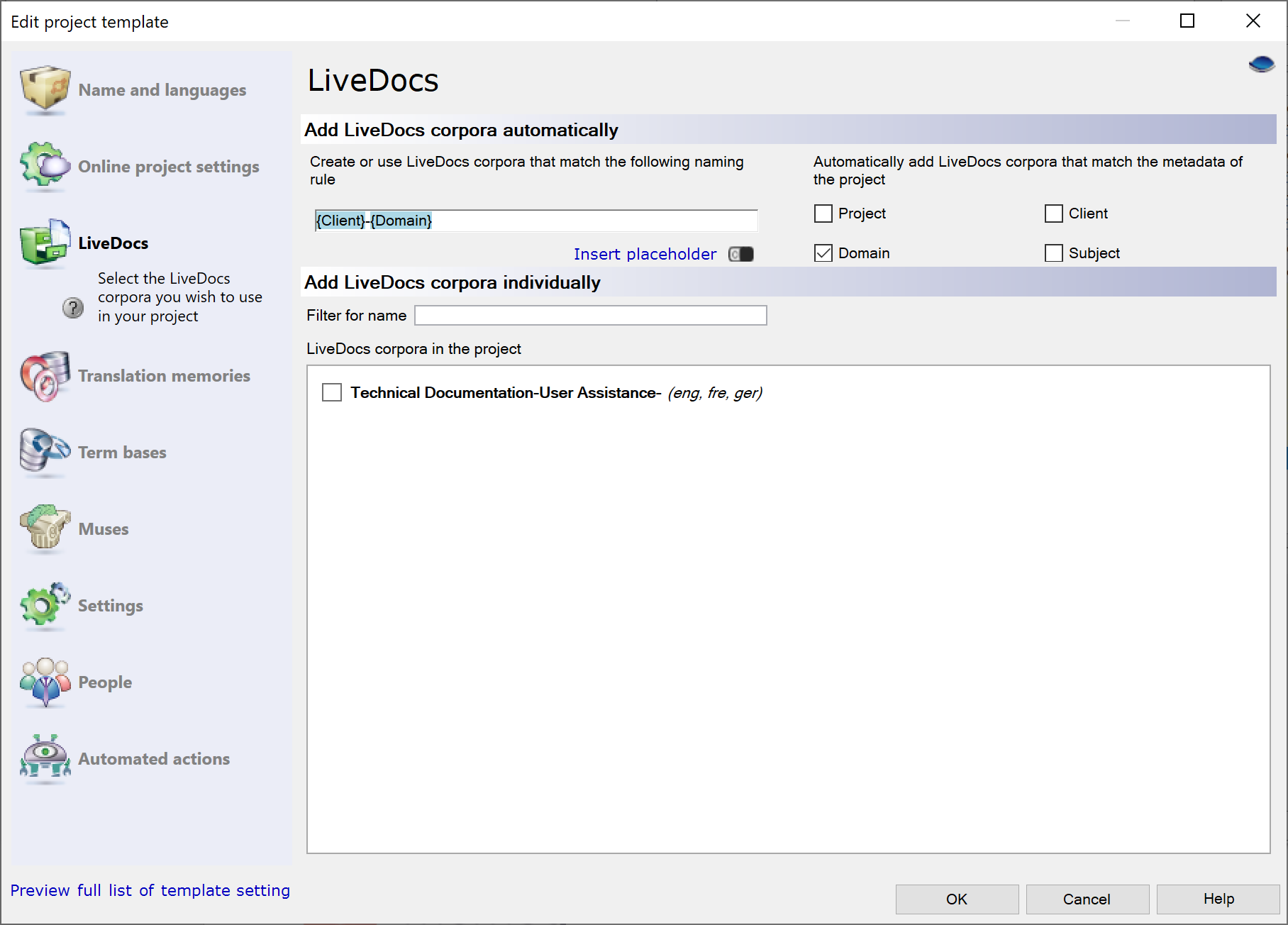
Under **Reference translation memories**, select **Client** and **Domain**.



For term bases, add the placeholders **Client** and **Domain,** and under **Automatically add term bases...**, select **Domain**.



Do the same for **LiveDocs**.



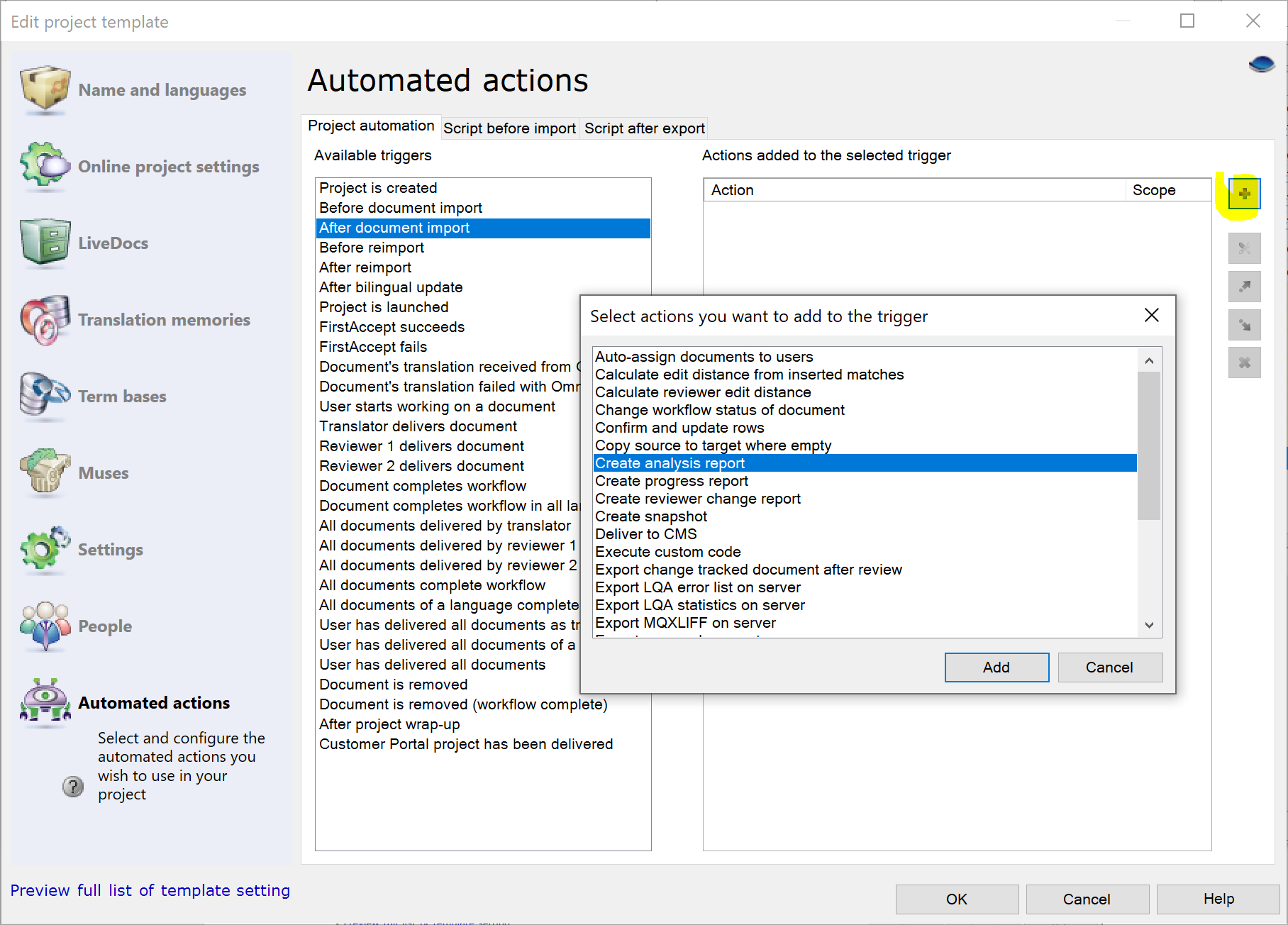
# **Automated Actions**

For this template, we do the following:

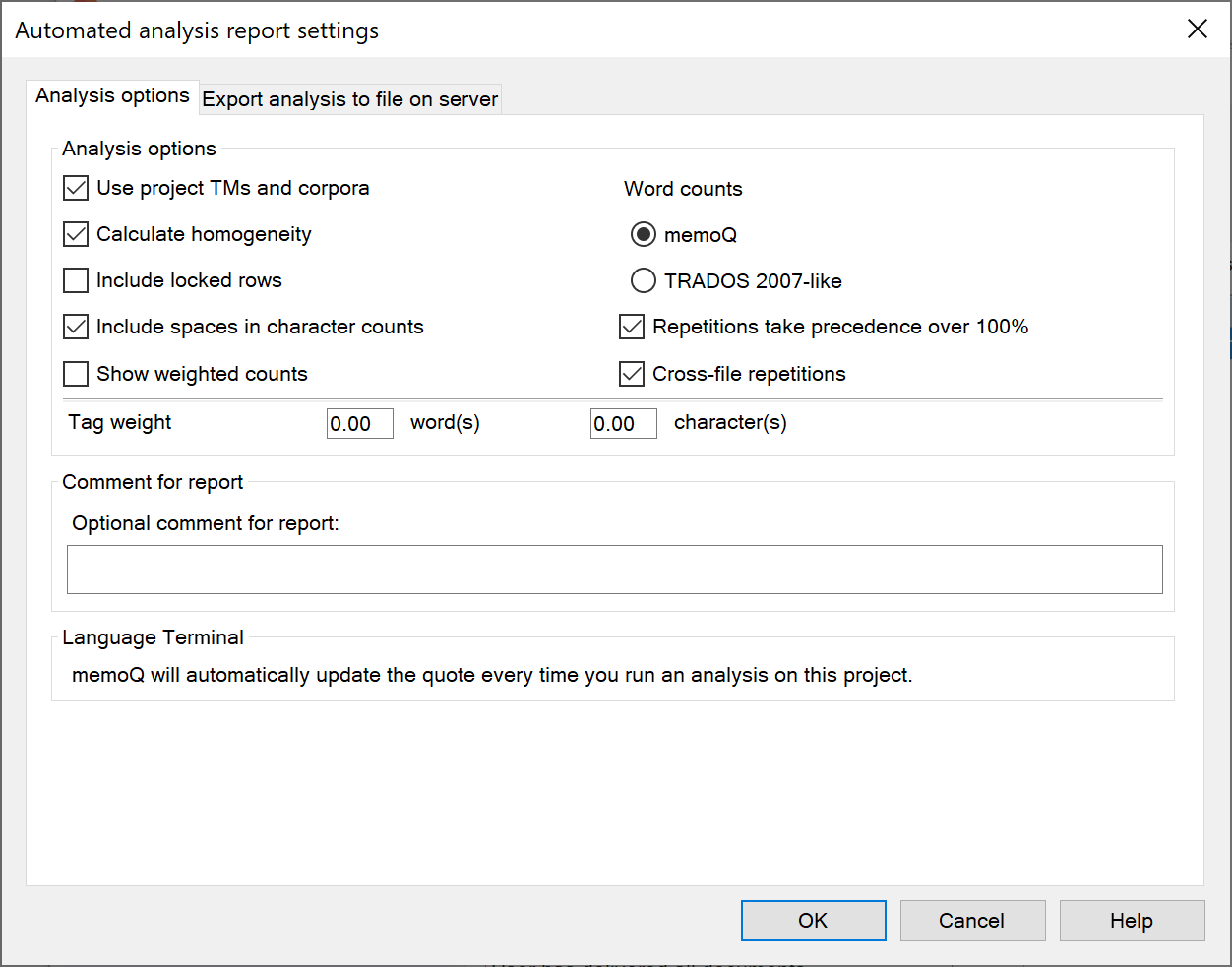
|  |  |
| --- | --- |
| Trigger | Action |
| After Document Import | Create analysis report |
| After Document Import | Pre-translate |
| Translator delivers document | Export table RTF on server |
| Document completes workflow | Run QA and export report to server |

Select the **After document report** trigger. Click on the **+** button to the right of the **Action** column.

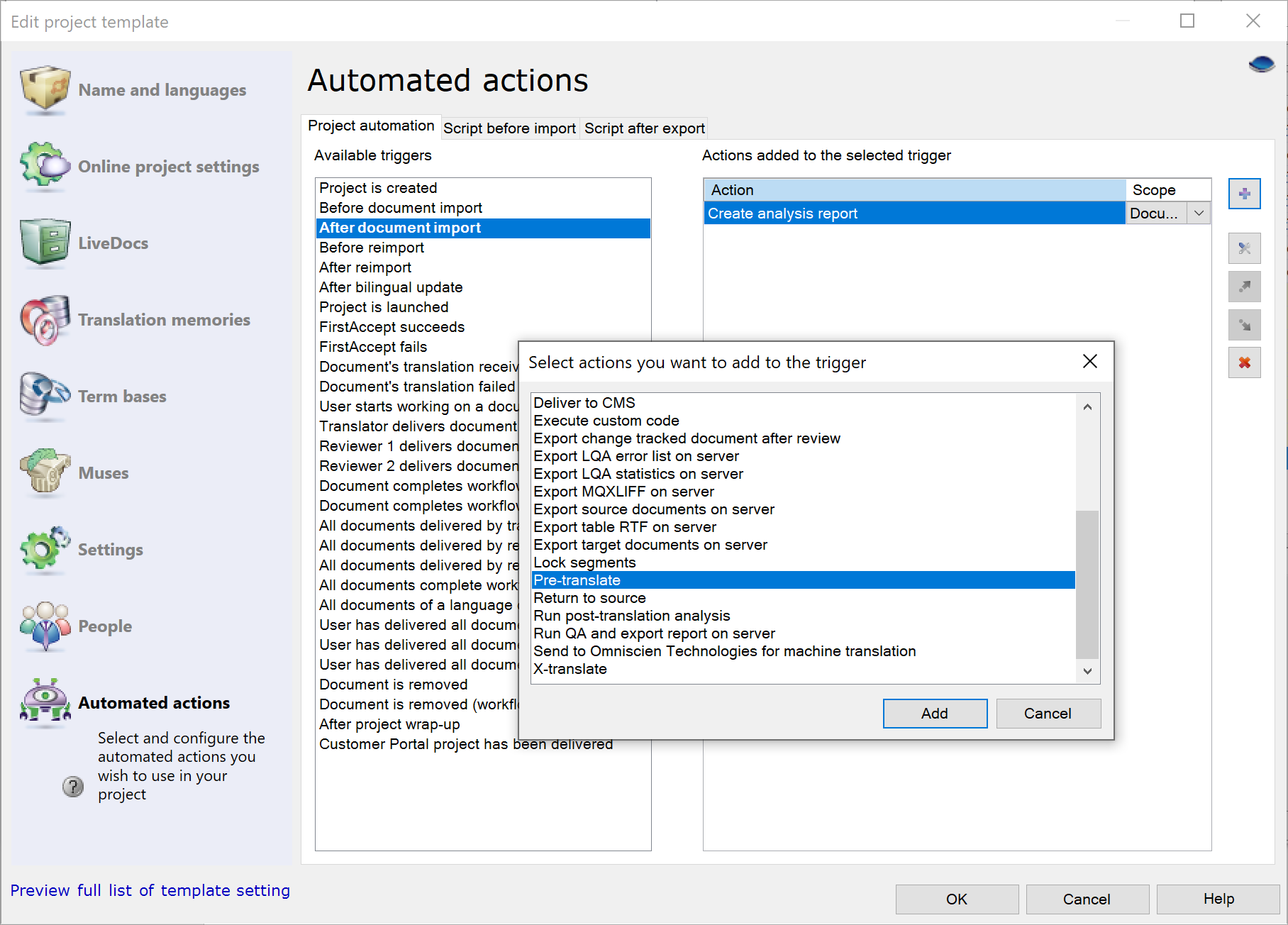
Choose **Create analysis report** from the list of actions. Click **Add**.



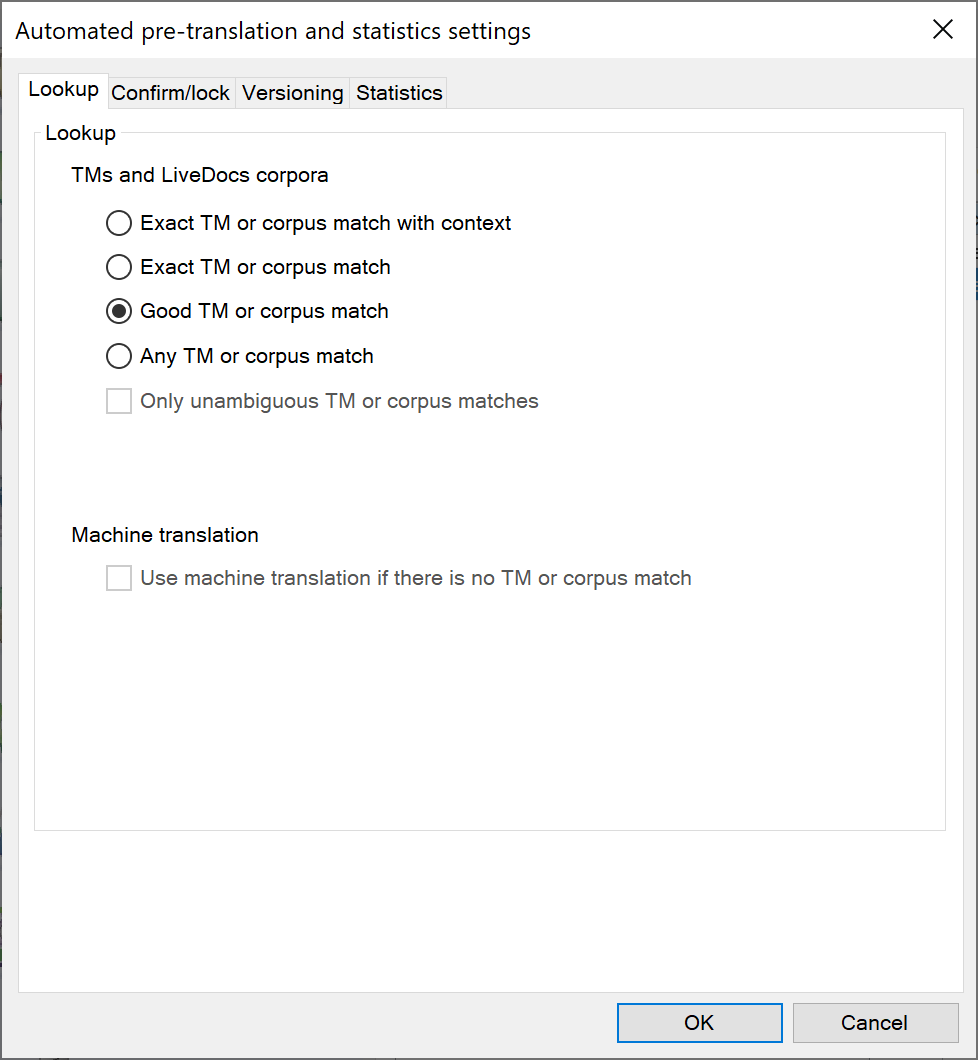
Change the options for the analysis report if needed, and click **OK**.



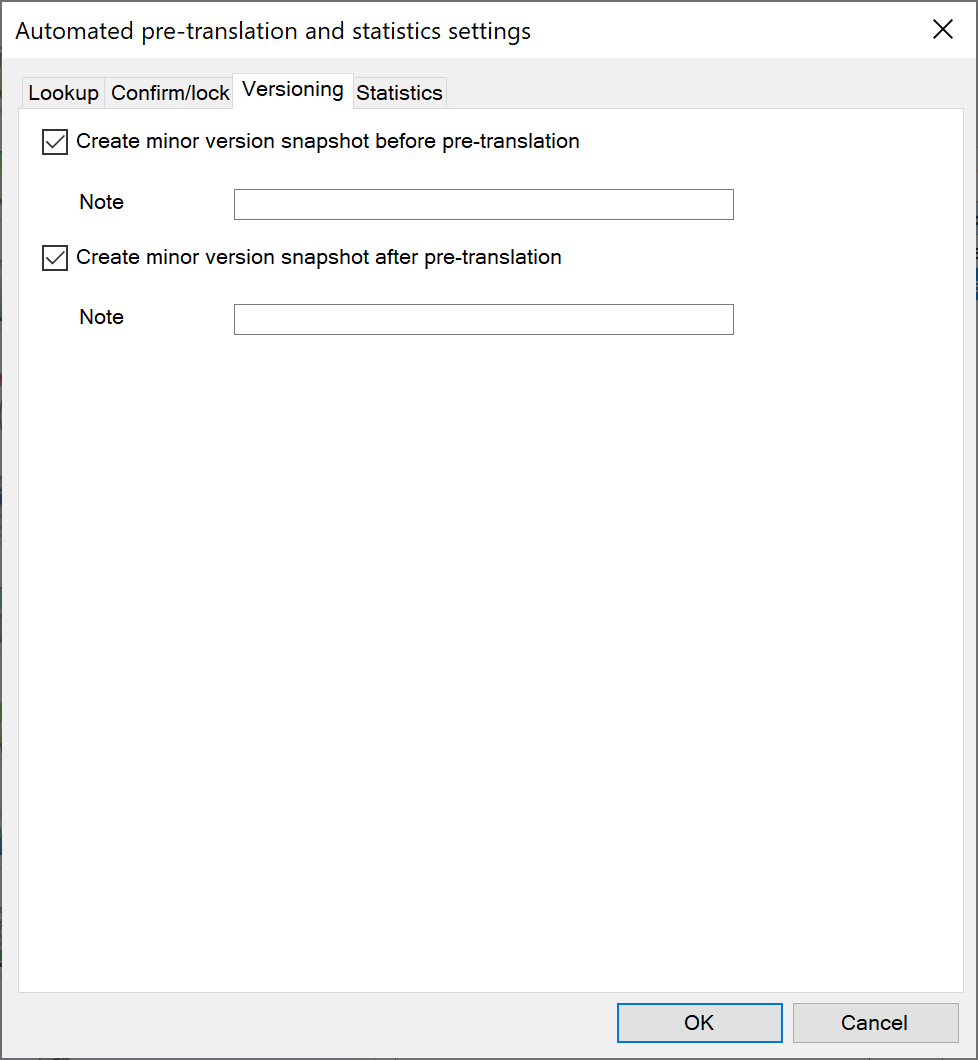
Add **Pre-translate** as an action, following similar steps.



In the **Lookup** option, choose **Good TM or corpus match**.



In the **Versioning** tab, click the boxes to create a version snapshot before and after pre-translation.

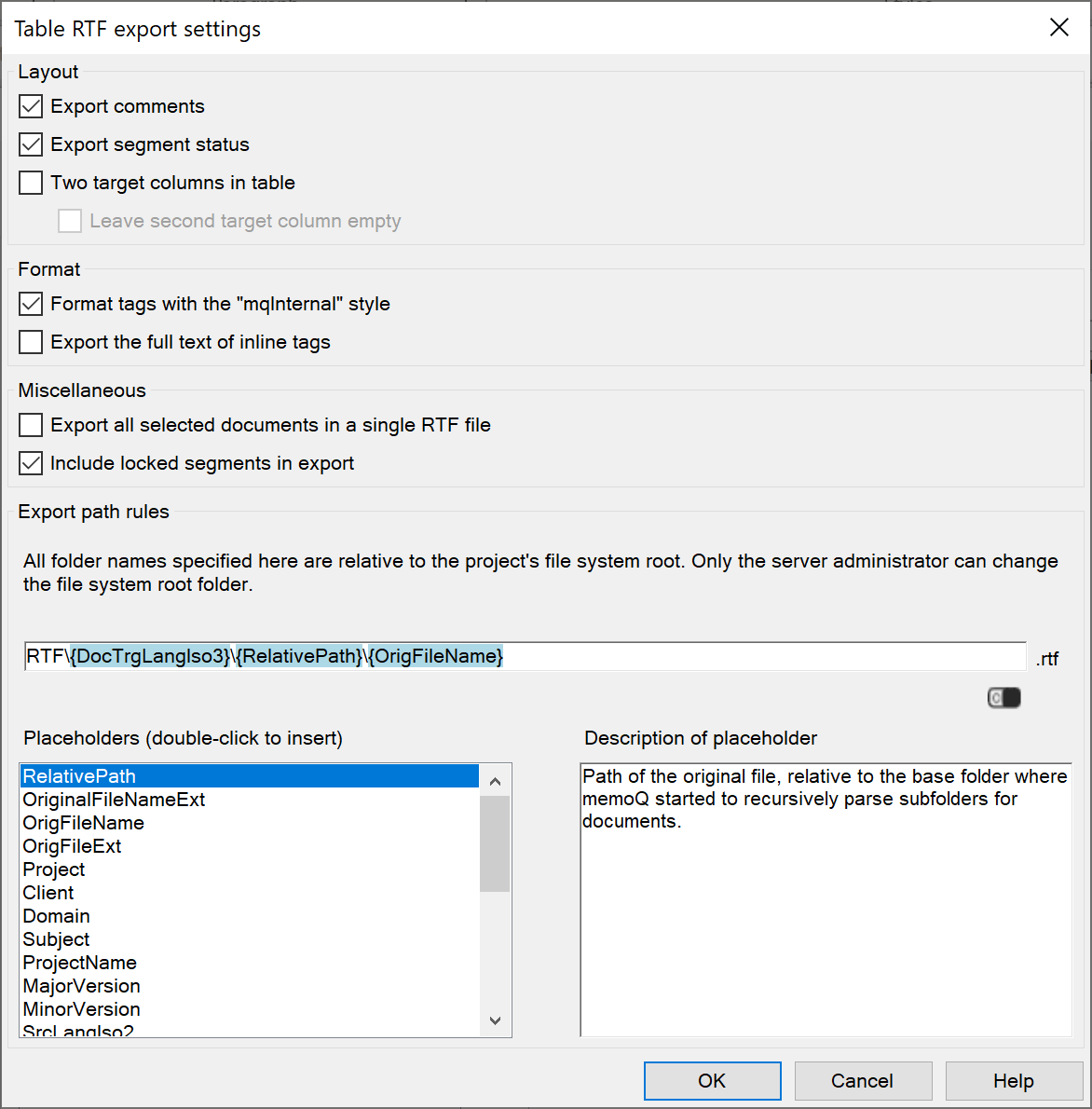


We want to create an RTF table for external review.

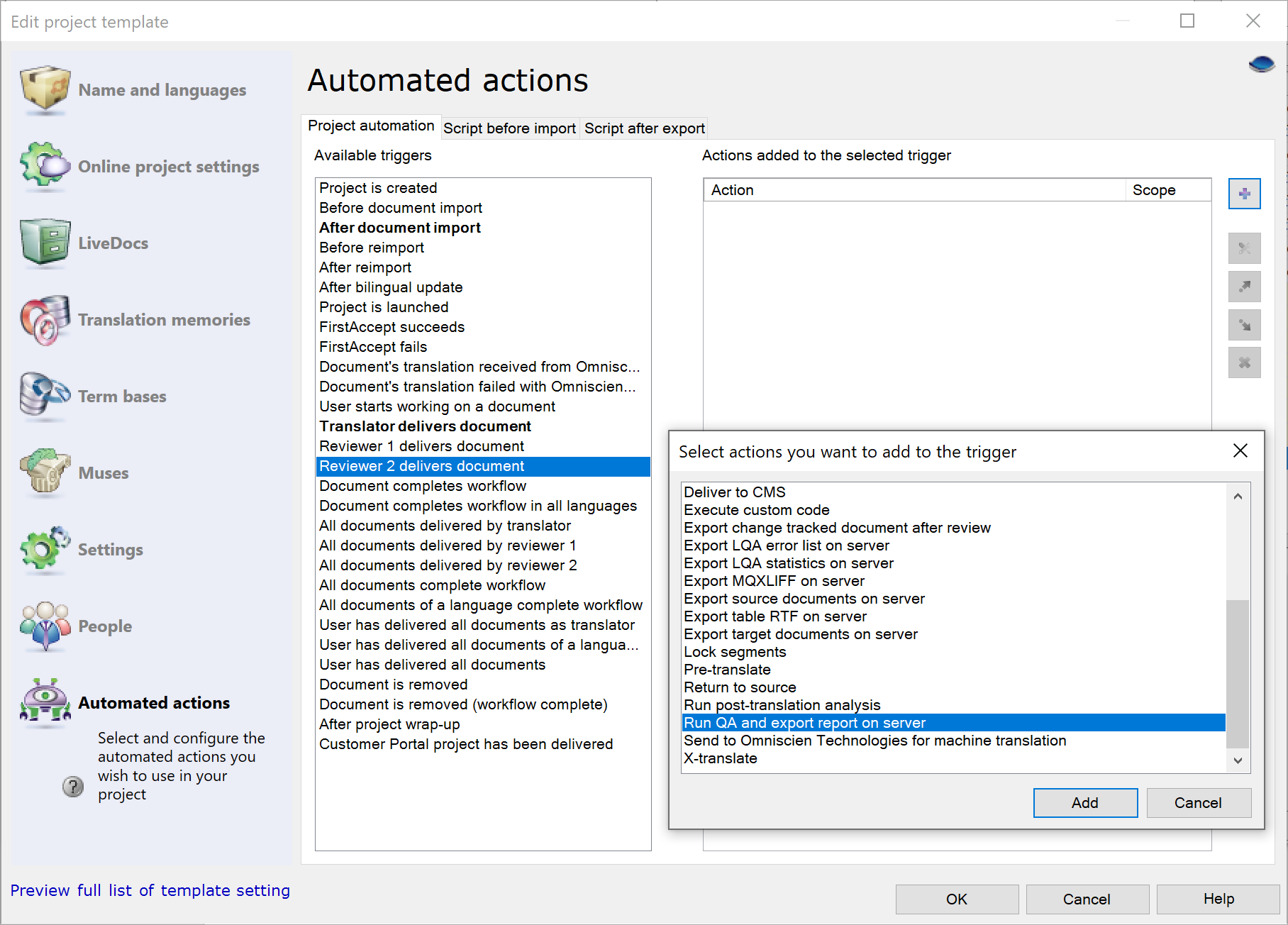
Select the **Translator delivers translation** trigger, and click the **+** button.

Choose **Export table RTF on server**.

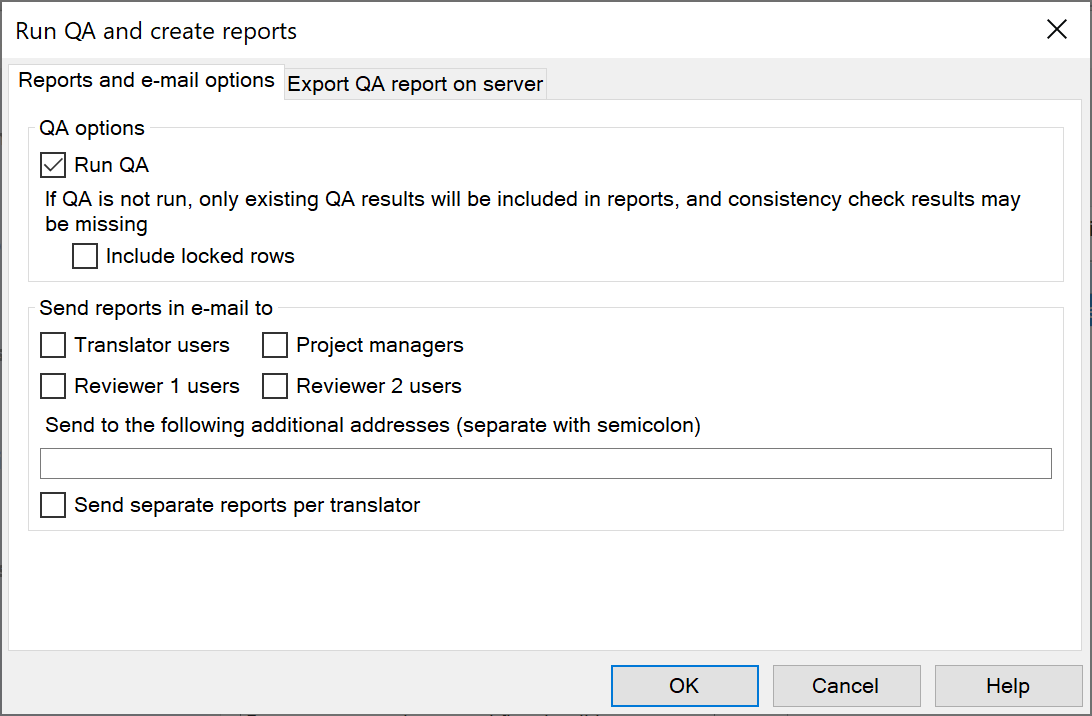
Change the export path or other options as needed. Click **OK**.



When each document is finished, we want to run a QA to discover any errors.



Choose what happens to the QA report. If you need to edit the QA settings, do that outside the project template.



Add more actions to triggers as needed.