



# Okodia resource portal

Plunet BusinessManager 7.3

## Contents

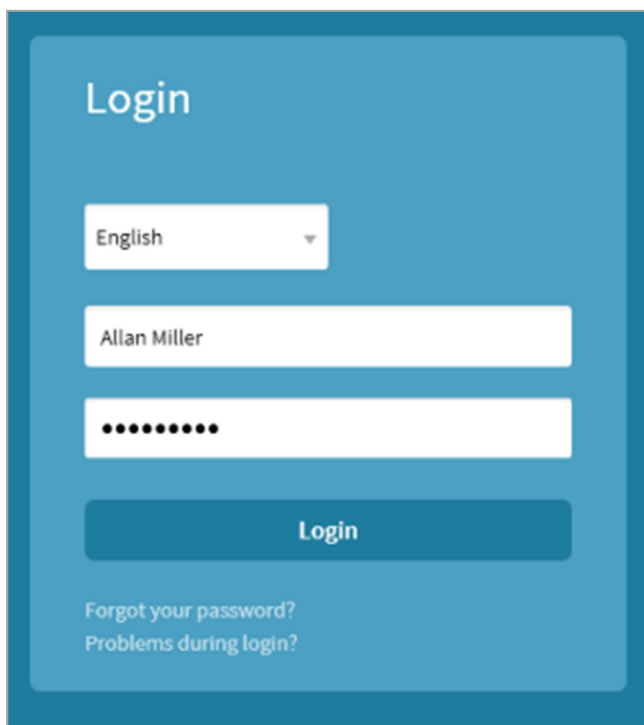
<b>Introduction</b> .....	<b>3</b>
<b>Login</b> .....	<b>3</b>
<b>Navigation</b> .....	<b>4</b>
Action bar .....	5
<b>Dashboard</b> .....	<b>6</b>
<b>Accepting a job</b> .....	<b>6</b>
<b>Job assignment</b> .....	<b>7</b>
Working on a job .....	8
Download source data.....	9
Deliver target data .....	9
<b>Creating invoices</b> .....	<b>10</b>
<b>Copyright Notice</b> .....	<b>12</b>

## Introduction

This description is aimed at all resources who work with Plunet BusinessManager at Okodia using the resource portal. With Plunet BusinessManager you can prepare and deliver your jobs, create invoices and maintain your own data in the system. This description gives you a brief overview of the workflow in a typical job.

## Login

Enter the URL of Plunet BusinessManager at Okodia in the address bar of your web browser (<https://tms.okodia.com>). The Plunet BusinessManager login screen is displayed. You can now log in by entering the user name and password provided to you by your project manager.



Login

English

Allan Miller

.....

Login

Forgot your password?  
Problems during login?

#### NOTE

If you enter the wrong password three times in a row, your account will be automatically locked for 24 hours. To unlock your account sooner, please contact your PM at Okodia. If you have forgotten your password, you can click on *Forgot your password?* and a new password will be sent to you by e-mail. If you have problems logging into *Plunet BusinessManager*, please click on *Problems during login?* and fill in the form to send a message to the system administrator.

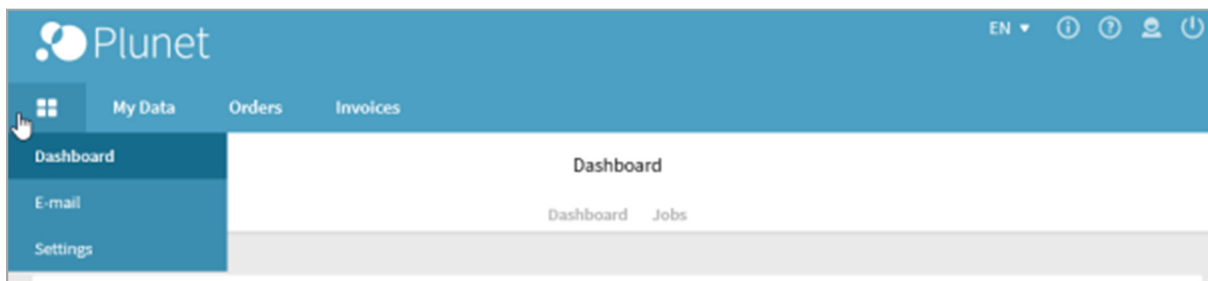
## Navigation

Plunet BusinessManager is based on web technologies and is designed in a completely browser-based manner. As a result, operation is generally similar to browsing through a website.

The navigation in Plunet BusinessManager is divided into the following levels:


- Tabs
- Menus
- Sub-menus

The number of tabs and menus that you can access depends on your rights. Click on a tab to access additional menu items at the menu level. These items then lead to additional menu items at the sub-menu level. When you click on a menu item at the sub-menu level, the view automatically jumps down to the corresponding section.




## Action bar


### Info

When you click on  in the top right-hand corner, the *Info* window opens. Here you can find useful documents and links.

### Support

Clicking on  opens a window with a link to further information about the resource portal.

### User

Clicking on  opens the *User* window with a link to the *Settings* page, where you can:

- Specify your availability periods by setting up the weekly schedule and entering your absences
- Make display settings, such as changing the date format or specifying the height/width of new windows
- Change your password
- Enter your e-mail settings

If you have the corresponding rights, you can also click on *My Profile* in the *User* window to open the *My Data* section. Here you can edit your contact data, view your weekly schedule and enter your working hours per month. You can also enter *Properties*, such as your areas of expertise, your source and target languages, which will be helpful to the project manager when he/she searches for resources for jobs.

### Logout

Click on  to log out of Plunet BusinessManager.

## Dashboard

After logging in, you reach the Dashboard. This page contains an overview of your jobs and invoices, organized by status. By clicking on a status (e.g. *In progress* or *Delivered*), you open a detailed list of all elements with that status.

Dashboard	
Jobs	Invoices
All (12)	All (12)
Requested (3) - Please reply	In preparation by resource (2)
Assigned - waiting	Created by resource (3)
In progress (1)	Outstanding (7) - Cleared for payment

The Dashboard can also be accessed at any time via *Home* → *Dashboard*. You can also modify your personal *Settings* or your *E-mail* configuration via this menu.

## Accepting a job

Your current and past jobs are listed under *Dashboard* → *Jobs*. The statuses are as follows:

- *Requested* → The project manager has sent you a request about these jobs and is waiting for you to accept/decline the jobs.
- *Assigned - waiting* → You have been assigned to these jobs, but have not started working on them yet (for example, when you have been assigned to the second job in the workflow and are waiting for the previous job to be completed).
- *In progress* → The jobs that you are currently working on.
- *Delivered* → The jobs that have been delivered back to the project manager.
- *Approved* → The jobs that have been approved by the project manager. If you have the corresponding right, you can create a vendor invoice for these jobs.

Click on *Requested - Please reply* to view a list of jobs that have been requested by the project manager.

Jobs - Requested

Options  [↗](#)

Job no. ##	Description	Due date ##	Status ##	Prices
<input type="checkbox"/> O-00087-TRA-001	Translation: English/German - Updated Manual 2016	Mon 04-04-2016	<span style="color: purple;">■</span> Requested	1,303.00 USD

When you click on a job, the job view opens as an overlay with all of the relevant data for the selected job. You can review the job details here before accepting the job. You can then confirm your availability under *Job → Specification*, accept the job and work on it right away or send your price for this job to the project manager, depending on the request.

**Confirm availability**

---

Status  Available  Conditional acceptance  
 Not available

Message to project manager (Optional)

---

A confirmation of your acceptance appears along with the link *E-mail to contact person*, which you can use to get in touch with the relevant contact person for this job, if necessary.

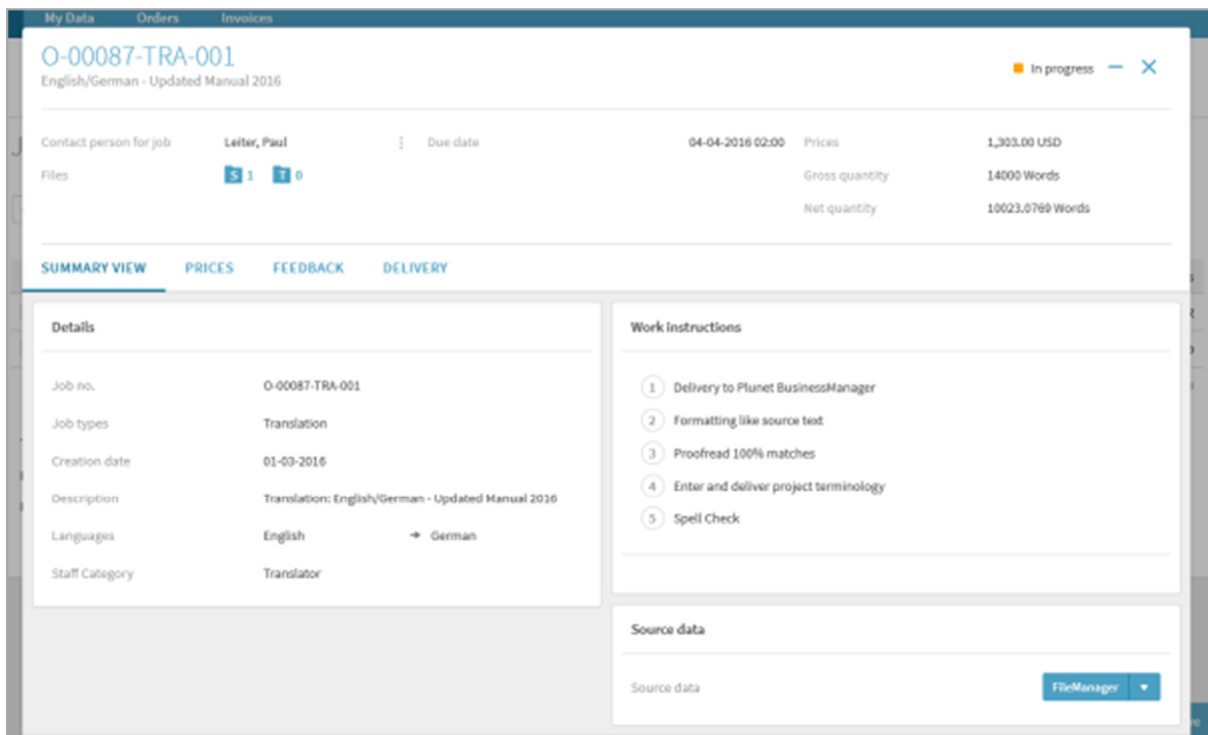
## Job assignment

The project manager will then assign the job to you. You will receive an e-mail with all of the relevant details. The subject line contains the job number and the message body contains the

details of the job. The job e-mail is also a request to log into Plunet BusinessManager and download all of the documents required to complete the assigned job. The whole workflow is described in detail below.

## Working on a job

You can find your job in the Dashboard under *In progress*. Clicking on the job number opens the job view in an overlay.



The screenshot shows a job view interface with the following details:

- Job ID:** O-00087-TRA-001
- Language Pair:** English/German - Updated Manual 2016
- Status:** In progress
- Contact person for job:** Leiter, Paul
- Due date:** 04-04-2016 02:00
- Prices:** 1,303.00 USD
- Files:** 5 1 1 0
- Gross quantity:** 14000 Words
- Net quantity:** 10023.0769 Words

The interface includes tabs for **SUMMARY VIEW**, **PRICES**, **FEEDBACK**, and **DELIVERY**. The **Details** section shows:

- Job no.:** O-00087-TRA-001
- Job types:** Translation
- Creation date:** 01-03-2016
- Description:** Translation: English/German - Updated Manual 2016
- Languages:** English → German
- Staff Category:** Translator

The **Work instructions** section lists:

- 1 Delivery to Plunet BusinessManager
- 2 Formatting like source text
- 3 Proofread 100% matches
- 4 Enter and deliver project terminology
- 5 Spell Check

The **Source data** section includes a **FileManager** button.

## Download source data

Go to the *Source data* section and click on the *FileManager* button to pick up the source documents.

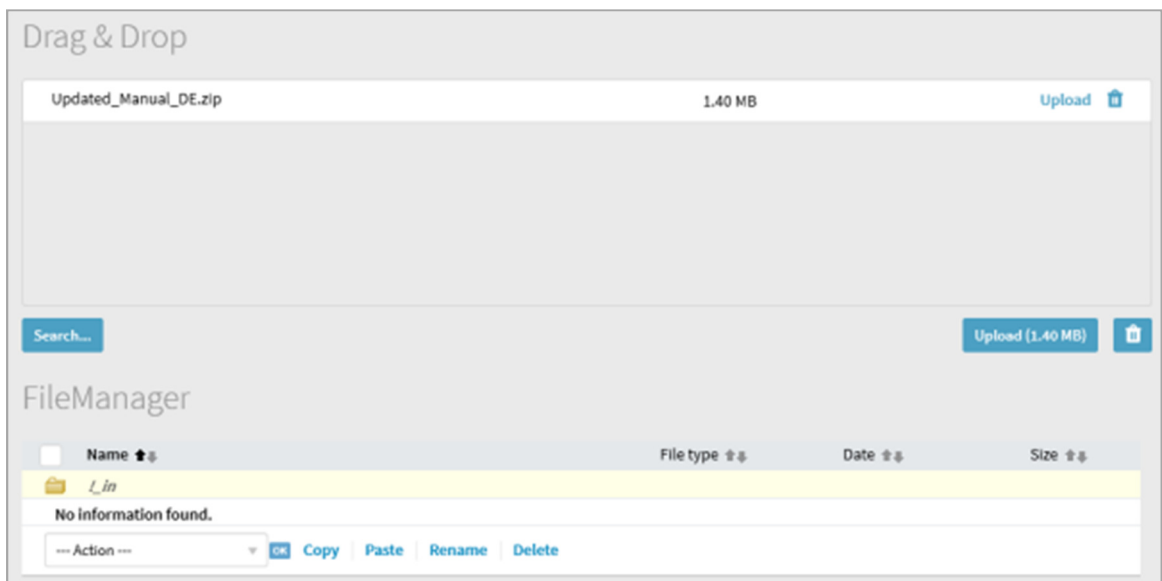
The *!\_out* folder contains all of the files you need to carry out the job, as well as a copy of the job e-mail you have already received.

## Deliver target data

JOB → DELIVERY

Once you have completed the job, you can deliver the documents in Plunet BusinessManager. Open the job and go to the *Delivery* tab.

1. Under *Deliver data to server*, click on *Target data*. Upload your completed documents by clicking on *Search...* and selecting the documents. Alternatively, you can upload the files via Drag & Drop by selecting the files in your file explorer and dragging them to FileManager.



2. Click *Upload* and the data will be saved in the *!\_in* folder for your job. Once the upload is complete, you can close the window and return to the detailed view of the selected job.
3. If a checklist of work instructions needs to be completed for the job, you need to review the checklist under *Check work instructions* and save the changes before the job can be delivered. To do so, select all of the work instructions with *Not carried out* or *Carried out*.

Deliver data to server

1 Target data

**Check work instructions**

WORK INSTRUCTIONS	✖ NOT COMPLETED	⏪ < > ⏩ PLEASE SELECT	✔ COMPLETED
<span style="color: green; font-weight: bold;">1</span> Delivery to Plunet BusinessManager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<span style="color: green; font-weight: bold;">2</span> Formatting like source text	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<span style="color: green; font-weight: bold;">3</span> Proofread 100% matches	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<span style="color: green; font-weight: bold;">4</span> Enter and deliver project terminology	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<span style="color: green; font-weight: bold;">5</span> Spell Check	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Send delivery**

Note to be included with delivery

Partial delivery
Final delivery

4. Under *Send delivery* you have the option of leaving a delivery comment. Afterwards, click on either *Partial delivery* or *Final delivery*, depending on the process of the job. A message appears stating that this action will confirm the delivery of the job. The delivery date appears underneath your delivery comments. Your project manager will now receive a delivery e-mail containing the job data and your delivery comments.

## Creating invoices

If you have the corresponding right, you can create your own invoices in Plunet BusinessManager.

Once the project manager has set the status of your job to *Approved*, it will appear in your Dashboard under *Approved - please create invoice*.

An invoice can be created by selecting the relevant jobs and clicking on *Create invoice for approved jobs* underneath the list of jobs. If there are any discrepancies between the data in the system and the your personal records, the you should contact your vendor manager or project manager.

If you have worked on jobs in different currencies, only the jobs in the same currency can be invoiced together.

After clicking on *Create invoice for approved jobs*, a new invoice opens and you can enter/modify the required information. The status of the invoice is initially *In preparation*.

In the *General invoice data* section, you can enter your invoice number, the invoice date, and the *Payment due date*.

Invoices 0000041

After checking all the details, please submit the invoice for approval. [Submit for approval](#)

General invoice data

Internal invoice number	0000041	Status	Not submitted
Your invoice no.	<input type="text" value="P-1003"/>	Invoicing date	<input type="text" value="01-01-2017"/>
Sender	Miller, Allan	Value date	<input type="text" value="01-01-2017"/>

In the *Edit invoice* section, it is possible to delete individual jobs that are not supposed to be included in the invoice and modify quantities that deviate from the quantities entered when the job was created, e.g. words translated.

When you have entered all of the data for the invoice, click on *Submit for approval*. The status of the invoice changes to *Created by external user* and the project manager will receive the invoice by e-mail.

## Copyright Notice

Okodia SLU  
C/ Núria 57  
08191 Rubí, Spain

All ideas, proposals, text and images are the intellectual property of Okodia SLU and are subject to the pertinent copyrights. The unauthorized use of this material is expressly prohibited – no part of this document may be furnished to others, copied, reproduced or transmitted by any means or for any purpose. All rights reserved.