# ÜbrTà Guide for Vendors

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Last updated 9 December 2013

To contact the ÜbrTà team for support or with suggestions, please email ta_support@csoftintl.com.

# About ÜbrTà

ÜbrTà is CSOFT International's resource management and accounts payable system. As of 4 March 2013, all purchase orders for vendors are issued through the system, and all invoices received via it. In addition, CSOFT project managers will find qualified vendors for projects through the system, so it's important to keep your profile updated with all your services and rates.

ÜbrTà is completely integrated with Tà, CSOFT's online translation management system and CAT tool. Logins are shared between the two systems, and they are connected in a number of other ways: for example, ÜbrTà points are largely related to the amount of translation work undertaken in Tà. But regardless of whether a project will take place in Tà or not, all POs and invoices will still go though ÜbrTà.

If you represent a translation agency, request an agency login in ÜbrTà. This will allow you to prevent any translators you outsource to from accessing ÜbrTà (where they would be able to see your rates) even though they may do translation in Tà. You can also have separate project manager and accountant logins, able to view and assign jobs and invoice POs respectively. All of these logins can be set up and managed by you in your Profile.

ÜbrTà has been created with the guidance of our users, and this process is ongoing. If you have any suggestions, regardless of how trivial, please get in touch and let us know. You can contact us at any time at ta_support@csoftintl.com.

# Accessing ÜbrTà

ÜbrTà can be accessed at www.ubrta.com/resource.

All vendors already qualified by CSOFT prior to 4 March 2013 will be provided with login details via email. New vendors can get signed up and qualified by following the processes in the "Signing Up & Getting Qualified" section.

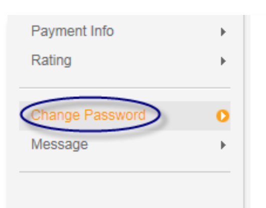
**Forgot Your Password?**

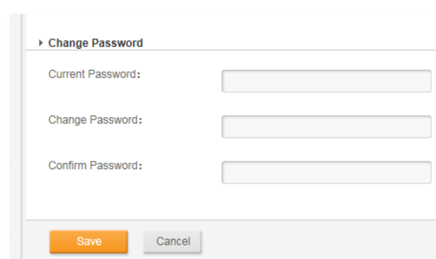
If you forgot your password, you request a new one by clicking "Forgot password?**"** on the sign in page of www.ubrta.com. You will receive an email entitled "How to reset your password". After following the link in the email, you will be able to set a new password.




**Changing Your Password**

For security purposes, we recommend that you change your password every six months.  After logging in, you can find the **Change Password** function under **Settings**.

ÜbrTà

# Signing Up & Getting Qualified

NOTE: IT IS NOT NECESSARY TO SIGN UP IF YOU WERE AN ALREADY QUALIFIED CSOFT VENDOR PRIOR TO 4 MARCH 2013. A login will be provided to you.

Signing up contains the following main steps: validating email address, filling out basic information, signing a contract then undertaking a test. After each step, a member of CSOFT's Global Resources team will check your application, and you will receive an email notification when you are clear to pass to the next stage. The whole process may take several days.

## How to sign up

**Step One: Email Verification**

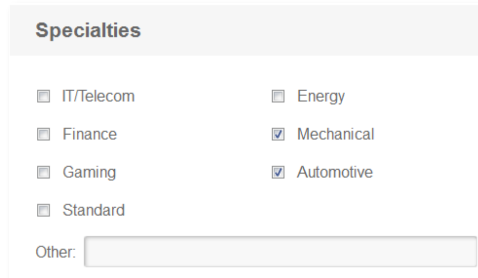
1. Visit www.ubrta.com
2. Click *Sign up now*
3. Indicate whether you are a freelance translator or if you represent an agency or a team
4. Enter required fields: *Email, Password, Re-enter Password,* and *Validation Code*
5. Review the *Privacy Policy*
6. Click *Continue*
7. A confirmation email will be sent to your email address. Please verify your email address by following the link provided in the email.


**Step Two: Basic Information**

1. Add your **basic info**
    i. Fill in all required fields: *Salutation, Gender, First Name, Last Name, Address, City, Country, Year you became a freelancer,* and *CV Link.* Then upload your CV and add a profile photo

ii. Click *Save & Continue*

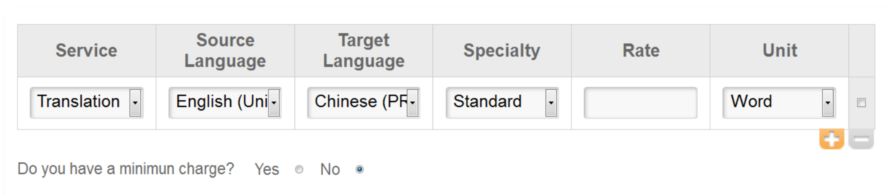
2. Add your **contact info**
   i. Fill in all required fields: *First Name, Last Name, Primary Email,* and *Telephone Number*
   ii. Click *Save & Continue*
3. Add your **services & rates**
   i. Under **Specialties**, check all industries that you are familiar with translating *(e.g. Mechanical or Automotive).* If an industry is not listed, please include in the field *Other.*



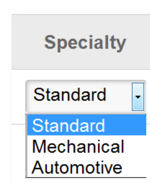

   ii. Please include any additional information, for example any industry/topics that you prefer to avoid, in the Notes box.
   iii. Check all CAT tools you work with and specify the version number. If you work with a tool not included in the provided list, you may list it in the Other field.
   iv. Select the Currency you prefer to get paid in from USD, EUR, or CNY.
   v. Specify desired rates
   vi. Select the services you plan to provide through ÜbrTà by checking Linguistic, Voiceover, DTP and/or Miscellaneous.

If you are providing ***Linguistic*** services, your fields will look like this:

1.



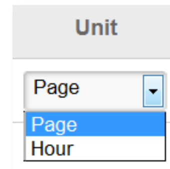

i. Specify the service and languages which you will translate into by adding a new row for each. If a service or language pair is not indicated, it will be assumed that you do not provide them.
ii. To indicate different rates for the specialties you specified at the top of the page, add a new row for each.
iii. If two or more of your specialties have the same rate, indicate "Standard" under specialty. This will apply the rate across all specialties which have not been assigned another rate separately.



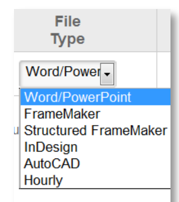

iv. Provide your rate and select your unit from Word, Hour, or Character. Character is mostly for Asian languages as source languages.
v. To add an additional service, language, or specialty click the button to add another row. To remove a row, please its box and click the button.
vi. If you have a minimum charge, please specify.

If you are providing ***DTP***, your fields will look like this:


i. Begin by specifying the unit you wish to base your rate on.




ii. Next, select which file types you work with. If your selected unit is per page, select between Word/PowerPoint, FrameMaker, Structured FrameMaker, InDesign, or AutoCAD. If your selected unit is per hour, select Hourly.




iii. If two or more of the language types share the same rate, choose "Standard" under language type. This will apply the rate across all language types which have not been assigned another rate separately.

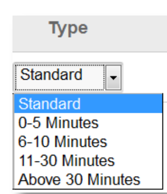
iv. To add an additional file type or language type, click the button to add another row. To remove a row, please its box and click the button

v. If you have a minimum charge, please specify.

If you are providing ***Voiceover***, your fields will look like this:


i. Select your language

ii. If you prefer a flat per minute rate, select Standard for your type. If your rate varies based on length, please choose the time-frames and specify the corresponding rates.




iii. To add an additional language or type, click the button to add another row. To remove a row, please its box and click the button

iv. If you have a minimum charge, please specify

For transcriptions and linguistic testing check the *Miscellaneous* box and fill in fields accordingly.

4. Press "Submit". Your application will be checked by a CSOFT member of staff. If you are qualified for proceeding to step 3, you will receive an email.

**Step Three: General Contract**

1. Log back in to ÜbrTà and click "Continue".
2. Check the "How CSOFT works" and "General Contract" documents. Download the "General Contract", print it, sign it, scan it, and re-upload.
3. Check the "I have read…" check box and press Save & Continue. Your contract will be checked by a CSOFT member of staff. If you are qualified for proceeding to step 4, you will receive an email.

**Step Four: Testing**

1. Log back in to ÜbrTà and click "Continue".
2. Accept the test then click "Translate".
3. Click "Download" to download the ttx test file. Do the test offline.
4. Click "Upload" to upload the bilingual ttx.
5. Your test will be checked by a CSOFT member of staff. If you have passed the test, you will be able to access the dashboard below, and start receiving CSOFT projects!

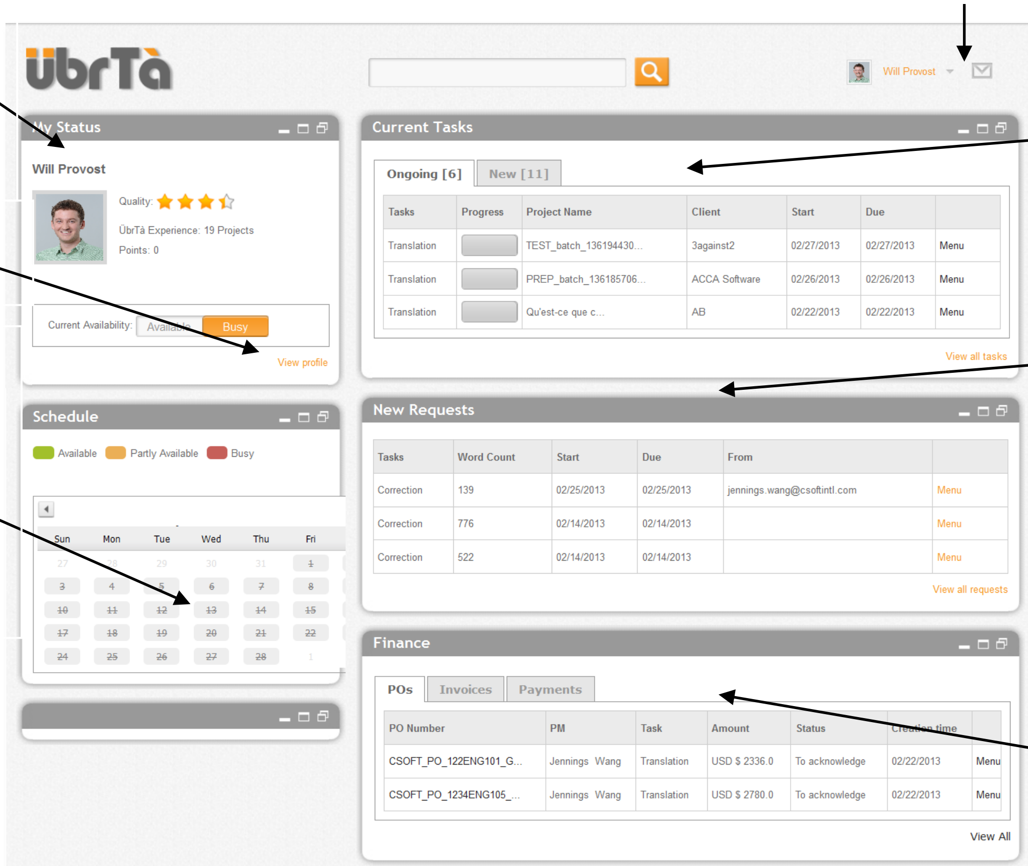
# ÜbrTà Dashboard

Change your password in settings

**My Status** - view your profile, rating, and set your current availability.

**Profile** – access your profile

**Schedule** – communicate your availability to those you work with and keep track of duties




**Current Tasks** - see all online projects that you are currently working on

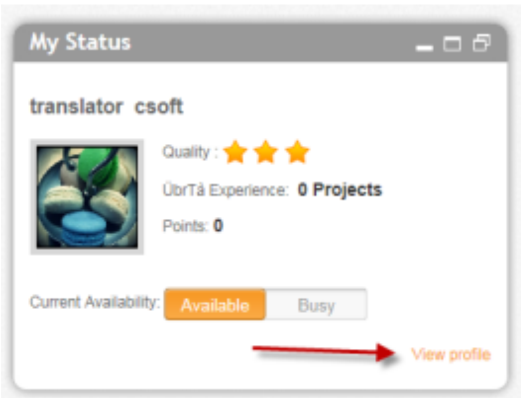
**New Requests** – accept / reject online projects you have been requested to work on

**Finance** – view POs, submit invoices and track payments

ÜbrTà

# Profile

In ÜbrTà, all vendors will have a profile where you can access and update your company's information.




Your profile can be accessed by clicking *View profile* from the My Status part of your dashboard, or alternatively by clicking on your name in the top-right hand corner.

Your profile has some key fields: Quality, ÜbrTà Experience and Points.

**Quality** is made up of the average of ratings given to you by CSOFT project managers following projects. PMs will rate you based on the quality of delivery, timeliness of delivery, value for money, responsiveness and technical capability.

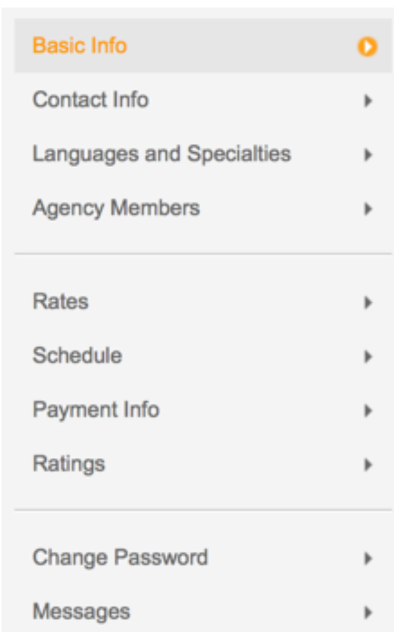
Notes:

- Vendors are given 3 stars by default.
- If you've completed a few projects but your quality rating isn't changing, feel free to get in touch with the project manager you worked with to give you a rating.

**ÜbrTà Experience** is the number of projects undertaken in ÜbrTà.

**Points** relate to the amount of projects you do in Tà, mostly. Later, they will be exchangeable for things like earlier payment terms on particular invoices.

The following sections are available in the profile:

<table>
<tr><th>Profile Menu</th><th>Page</th><th>Description</th></tr>
<tr><td rowspan="10">
</td><td>Basic Info</td><td>Fundamental information about you or your company. Changes to name will be validated by CSOFT to protect you from fraud.</td></tr>
<tr><td>Contact Info</td><td>Please keep your contact info up-to-date here. As Primary Email is also your username, changes will be validated by CSOFT. Once updated, only your new email will give you access to both ÜbrTà and Tà.</td></tr>
<tr><td>Languages and Specialties</td><td>A list of all languages and specialties you can provide, as well as notes about your services and your supported CAT tools.</td></tr>
<tr><td>Agency Members</td><td>Only accessible to qualified agency users, this will enable you to add and manage sub-users, including translators, project managers and accountants.</td></tr>
<tr><td>Rates</td><td>Your rates for all services. This section is not visible to agency PM and translator roles. If you want to update your rates, get in touch with a Resource Manager directly at gr.sourcing@csoftintl.com.</td></tr>
<tr><td>Schedule</td><td>If you will be unavailable or only partially available for a time, please indicate this here.</td></tr>
<tr><td>Payment Info</td><td>Keep your banking and PayPal information updated here.</td></tr>
<tr><td>Ratings</td><td>See ratings given by PMs to you for projects undertaken.</td></tr>
<tr><td>Change Password</td><td>Change your password.</td></tr>
<tr><td>Messages</td><td>Messages sent to you from CSOFT PMs. Feature is still in development.</td></tr>
</table>

If you have Agency Manager, Agency PM or Agency Accounting roles, you will see an “Agency” and “Personal” tabs. “Agency” relates to your agency’s main account, with the information seen by CSOFT PMs. Changing information here (when possible) will also change the main account. “Personal” is just for your specific account. Information here is mostly for the benefit of agency managers.

Here is a summary of the rights of each of the users:

**Agency Manager:** Able to accept, reject, translate and share project files; view payment information, accept POs and submit invoices; and (exclusive to Agency Manager) update all agency information and add or update users.

**Agency Accounting:** Able to view payment information, accept POs and submit invoices. No access to projects.

**Agency PM:** Able to accept, reject, translate and share project files. No access to financial features like POs, rates and invoices.

**Agency Translator:** Only able to access any project files assigned to them via the Share feature in Tà. No access to ÜbrTà at all, and as such have no access to financial information. Also not permitted to click Finish in Tà.

# Accepting POs

After you accept an online project, or after a PM creates an offline project, the PM will be required to create a PO for you. You will then be expected to login to ÜbrTà to accept that PO. The process is as follows:

1. Receive an email notification from ÜbrTà or the PM about a new PO
2. Login into ÜbrTà and scroll to the Finance dashboard at the bottom-right of the page
3. Click “View All”
4. Find the desired PO and click on the orange link to see the PO details

| PO Number | PM | Task | Am |
|---|---|---|---|
| CSOFT_PO_122ENG101_Good Translations | Jennings Wang | Translation | USI $ 2 |
| CSOFT_PO_1234ENG105_Good Translations | Jennings Wang | Translation | USI $ 2 |

5. If you wish to **accept** a PO, scroll over to the right and click “Menu,” and then click “Accept”.
6. If you wish to **reject** a PO, scroll over to the right and click “Menu,” and then click “Reject”. You’ll need to provide a reason for the rejection.

Previously – accepted POs can be accessed from this dashboard.

# Invoicing

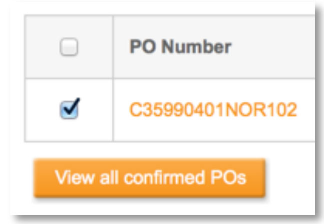
Invoices are processed in the ÜbrTà system, and can be submitted once a PO has been confirmed. POs cannot be invoiced before they are confirmed. For Online Projects translated using Tà, PMs will receive a reminder to confirm POs once you have completed your work. POs for online projects will be automatically confirmed after 2 weeks.

1. Before invoicing, set your payment information in the Profile, by clicking "View profile" from the "My Status" window in the dashboard or your name in the top-right of the page. Then click "Payment Info".
   - Set your "Bank Info" and "PayPal Info"
     - **Note:** before setting any information, you must first submit three security questions and answers. Make sure to remember these to be able to update your information in the future.
   - We can pay you through Bank transfer or PayPal
   - Payments will be made twice a month, collecting all the invoices ready to be paid together into single payments. Payments are processed differently depending on whether the total amount exceeds USD 500 or not, whether the total amount exceeds USD 150 or not, how your Payment Info page is filled out, as well as what you have indicated to us as your preferences offline.
     - For payments over USD 500, ÜbrTà will automatically choose the bank transfer method.
     - For payments USD 150 - 500, ÜbrTà will use PayPal unless you do not provide a PayPal account on your Payment Info page, in which case your invoices will be temporarily held until the total value of your invoices USD 500 is accumulated.
     - For payments under USD 150, your invoices will be temporarily held until the total value of your invoices reaches US$150. To receive payment(s) for smaller amounts via PayPal, please log into your own PayPal account and send us a money request to paypal@csoftsolution.com. Once we receive the request from PayPal, we will process and make the payment to your account.

Important note: the amount (above or below 500 USD) refers to the total of **all** invoices received within the payment window, not individual invoices.

2. Once your PO has been confirmed, you will receive an automatic email notification.
3. Login to ÜbrTà and scroll down to the Finance window on the dashboard.
4. Find the PO with "To invoice" status. If you can't find the PO, click "View all" then add a filter next to Status for "To invoice".

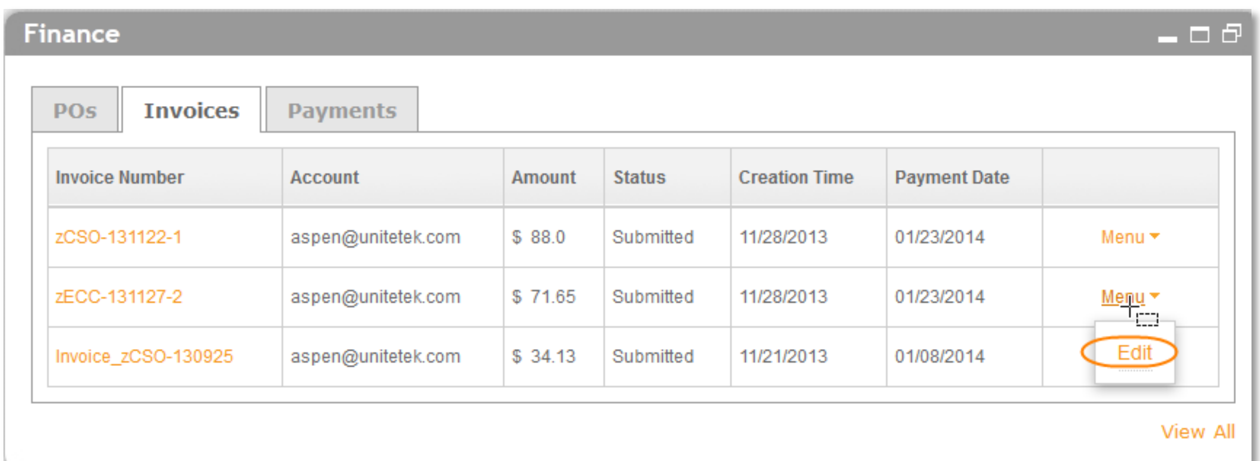
5. Next to the PO, click "Menu" and then "Invoice."
6. You can invoice separately or put as many POs together as you prefer. From the create invoice page, click "View all confirmed POs" to show any other POs ready for invoicing.
7. Submitted invoices can be viewed in the Invoices part of the Finance window in the dashboard.



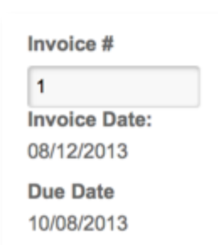

# Editing Invoices

Currently, only the invoice number can be updated after the invoice has been submitted. For any other changes, please get in touch with Tà support.

To change the invoice number on your invoice, in the Invoices tab of the Finance box in your dashboard, find the invoice and click Menu, then Edit.




Edit the invoice number:




Then click Submit.

ÜbrTà

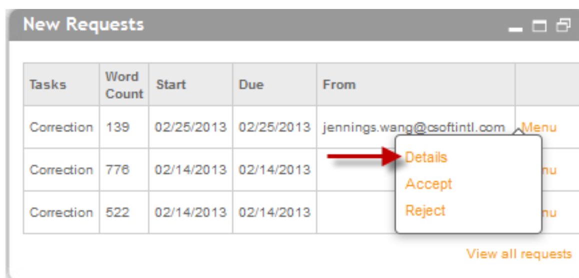
# Tracking Payments

Payment dates can be viewed via the "Payments" tab of the finance dashboard.

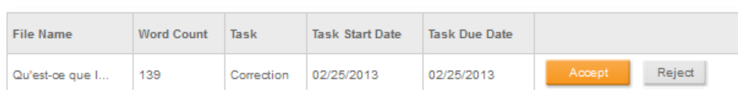
# Accepting / Rejecting New Online Tasks

Note: the following only applies to online tasks, to be translated in Tà. For offline tasks, there is no need to accept them in ÜbrTà. Online tasks can also be accepted in Tà.

1. Receive an automatic notification.
2. After logging into ÜbrTà, access the project under the **New Requests** section of the dashboard. The total word count is shown here.
3. View the end client, project name, instructions and other details by clicking "Menu" and then "Details."




4. Respond to the project by clicking "Accept" or "Reject". To accept all files, click "Accept" from the dashboard directly. To accept or reject individual files in a project, do so from the Details page.




# Accessing Files

Note 1: the following only applies to online tasks, to be translated in Tà. For offline tasks, the files will be sent to you through traditional ways (email or FTP).

Note 2: you will need to accept tasks before being able to access files.

1. Tasks you haven't started yet will be in the "New" section of "Current Tasks". As soon as you begin the translation, they enter the "In Process" section.
2. Once, you have located the project in “Current Tasks”, scroll over to the right and click “Menu” and then click “Translate” “Review” or “Correct.”
3. Tà will now open and you can find your project under "Inbox" and then “Ongoing translations”, “Ongoing reviews” or “Ongoing corrections” respectively. Please see the Tà Guide for Vendors for more information.

# Getting Support

For any suggestions or other feedback please email us at ta_support@csoftintl.com. We'll get back to you within 2 working days to let you know if your suggestions can be implemented and if so, when.

Enjoy ÜbrTà!