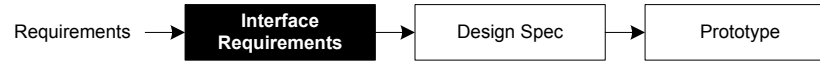


This **Information Mockup** is intended to describe interface controls, data and behaviors. It does not address design. Design is described in a **Design Mockup** and first implemented in a **Production Prototype**.



General Information
Last Modified: MM-DD-YYYY
Modify

Project Number	100035	Source Language	Language [lp-LP]
Project Display Name	Rosetta Stone	Target Languages	Language [lp-LP] Language [lp-LP]
Project Manager	First name Last name <username@company.com>	Domains	General Medical Arts & Entertainment

Workflows
Last Modified: MM-DD-YYYY
Modify All

Text Files

Source Documents	Workflow Name	Convert to RTF -> LE (Prep) -> Next active human task -> End	view modify
Target Documents	Workflow Name (all)	Translate > Edit -> QA -> End	view modify

Graphic Files

Source Documents	Workflow Name	Transcribe -> Next Step -> Next active human task -> End	view modify
Target Documents	Workflow Name (french)	Translate > Edit -> QA -> End	view modify
	Workflow Name (japanese)	Translate > Edit -> Proof -> QA --> End	view modify
	Workflow Name (others)	Translate > QA -> End	view modify

Accurate setup of your project requires that you ensure your workflows are accurate. If you would like to use the default workflows, you may continue. If you would like to make modifications to the workflows, it is recommended that you make them now.

Accept Default Workflow and Continue
Modify the Workflows Now

The first time the PM/PI returns to this screen, they will receive this. Only Gen Info and Workflows will be present on the screen until they continue or modify. After confirm/modify, all other sections will appear normally.

Schedule
Last Modified: MM-DD-YYYY
Modify

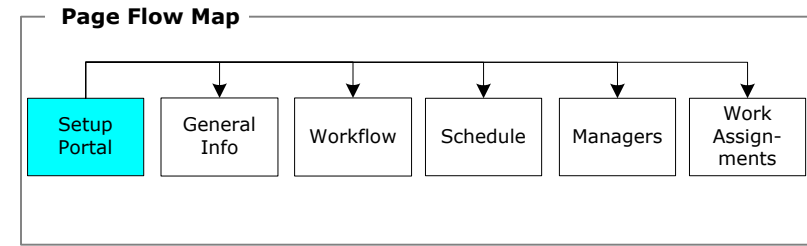
	Gated	Task	Language	Due		Gated	Task	Language	Due
<i>Gated: All</i>	Translate	Language [lp-LP]	MM-DD-YYYY		<i>Gated: New</i>	Translate	Language [lp-LP]	MM-DD-YYYY	
	Translate	Language [lp-LP]	HH:MM Daily			Translate	Language [lp-LP]	HH:MM Daily	
	Translate	Language [lp-LP]	6 Day Turnaround			Translate	Language [lp-LP]	6 Day Turnaround	
<i>Gated: New</i>	Translate	Language [lp-LP]	2 Hour Turnaround		<i>Gated: All</i>	Translate	Language [lp-LP]	2 Hour Turnaround	

Manager Assignments
Last Modified: MM-DD-YYYY
Modify

Role	Manager	Vendor	Role	Manager	Vendor
Translate			Translate		
Language 1	Manager	Vendor	Language 1	Manager	Vendor
Edit			Edit		
Language 1	Manager	Vendor	Language 1	Manager	Vendor
Language 2	Manager	Vendor	Language 2	Manager	Vendor

Purpose

"Dashboard" view of the properties of a project. Used as a portal to edit all aspects of the project properties.



Dynamic Data

Links
view: Navigate to View Workflow Details screen

Buttons
Modify: Display the editable version of this screen (**This button is only present for permitted users**)
Modify All: Navigate to Choose Workflow screen (need permission)
Continue with Project Setup: Repaint the screen with all sections of project setup showing
Modify the Workflows Now: Navigate to Workflows screen.

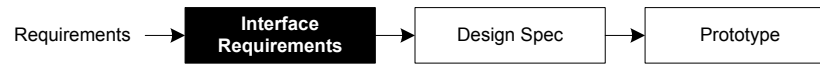
Notes

Each main screen of the project setup is represented on this page and displays a last modified date. While many individual pieces of data throughout Project Setup will display a last modified dates, the modified date on the Summary lists the last time any piece of the sub-screen was modified. As a rule, any unchanged/null last updated/modified dates should be replaced with the text "not modified".

Generally, if any piece of information must be hidden, it can be. Generally, if any entire section has been hidden from the user that section should not be displayed. Please see Erik Gibb when display permission clarify.

Last Modified dates will not be present for release 3.0, but will be added as an enhancement later.

1st time PM navigates to this screen they should only see the general info, workflows, and be asked to confirm the workflow defaults or edit them. This will seriously reduce the possibility for wasted time/error later in project setup.



Work Assignments Last Modified: MM-DD-YYYY [Modify](#)

Language 1

Task	Assigned Users	Assignment
Translate	20	Manual
Edit	20	Rules: All documents assigned to the default team (N users)
Proof	0	Manual
FQA	4	Rules: 4 rules determine work assignments

Vendor Rates Last Modified: MM-DD-YYYY

Task

Target Language	Vendor	Billing Unit	Rate	last modified
Language 1	Vendor 1	Block-Word	\$0.15 USD / 1000 words \$0.30 USD / 1500 words	MM/DD/YYYY modify
Language 2	Vendor 2	Block-Word	\$0.15 USD / 1000 words \$0.30 USD / 1500 words	MM/DD/YYYY modify
Language 3	Vendor 1	Block-Word	\$0.15 USD / 1000 words \$0.30 USD / 1500 words	MM/DD/YYYY modify

Reference Content Last Modified: MM-DD-YYYY

Instructions

Language	last modified	file name
All Languages	MM/DD/YYYY	project.txt view modify
Language	MM/DD/YYYY	foobar.doc view modify
Language	MM/DD/YYYY	foobar.ppt view modify
Language		add
Language		add

Style Guides

Language	last modified	file name
Language	MM/DD/YYYY	foobar.doc view modify
Language	MM/DD/YYYY	foobar.ppt view modify
Language		add
Language		add

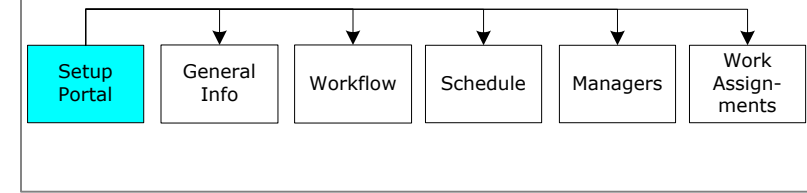
Glossaries

Language	last modified	file name
Language	MM/DD/YYYY	foobar.doc view modify
Language	MM/DD/YYYY	foobar.ppt view modify
Language		add
Language		add

Users

Project Manager ?

Page Flow Map



Dynamic Data

Links

modify (work assign)	Navigate to Work Assignments screen
modify (ref content)	Navigate to the associated modify ref content screen (only displayed if ref content exists, otherwise display add)
modify (vendor rates)	Navigate to the associated mod vendor rates screen
view	Download/display the associated reference content
add	Navigate to Add/Modifyscreen for selected (instructions/style guide/glossary)

Notes

Each main screen of the project setup is represented on this page and displays a last modified date. While many individual pieces of data throughout Project Setup will display a last modified dates, the modified date on the Summary lists the last time any piece of the sub-screen was modified. As a rule, any unchanged/null last updated/modified dates should be replaced with the text "not edited".

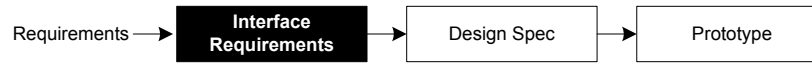
Generally, if any piece of information must be hidden, it can be. Generally, if any entire section has been hidden from the user that section should not be displayed. Please see Erik Gibb when display permission clarify.

Last Modified dates will not be present for release 3.0, but will be added as an enhancement later.

Reference Content: This is a best guess at how this may impact Project Setup. The use cases and requirements have not been delivered, so we'll have to wait and see.

Mgr Assignments: italic = delegate

work assignments color/bold = 0 qualified user notification



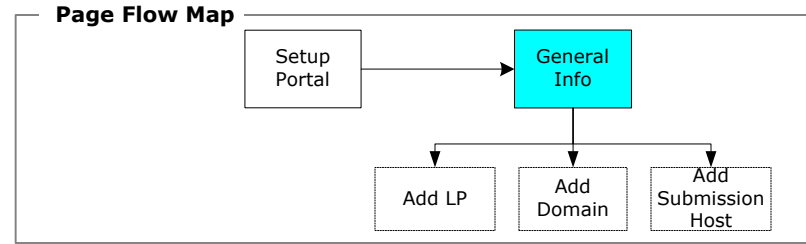
General Information

<p>Project Access Code 56789123 won't be displayed until after the first save</p> <p>Project Number <input type="text"/></p> <p>Project Name * <input type="text"/></p> <p>Project Nickname * <input type="text"/></p> <p>Client * Pull-down-1 ▼</p> <p>Project Type * Pull-down-4 ▼</p> <p>Project Value <input type="text"/> Pull-down-2 ▼</p> <p>Project Description <input style="height: 40px;" type="text"/></p> <p>Project Manager * Pull-down-3 ▼</p>	<p>Project Start Date <input type="text"/> open calendar <small>(xx/xx/xxxx)</small></p> <p>Project End Date <input type="text"/> open calendar <small>(xx/xx/xxxx)</small></p> <p>Language Pairs</p> <p style="text-align: center;">Add Language Pairs</p> <p>Language [lp-LP] → Language [lp-LP] remove 1</p> <p style="padding-left: 20px;">→ Language [lp-LP] remove 1</p> <p style="padding-left: 20px;">→ Language [lp-LP] remove 1</p> <p>Domains</p> <p style="text-align: center;">Add Domains</p> <p>General remove 2</p> <p>Arts & Entertainment remove 2</p> <p>Medical remove 2</p> <p>Submission Hosts</p> <p style="text-align: center;">Add Submission Hosts</p> <p>127.0.0.1 remove 3</p> <p>128.128.50.4 remove 3</p> <p>255.255.255.0 remove 3</p>
--	---

cancel
save

Purpose

Set broad properties of a project, including name, language pairs, and project manager.



Dynamic Data

Pull-down Menu Options

Pull-down-1	Available Clients
Pull-down-2	Available Monetary Denominations
Pull-down-3	Available Project Managers
Pull-down-4	Available Project Types

Links

[remove 1](#) Removes the associated language pair from the project (only displayed prior to active documents)

[remove 2](#) Removes the associated domain from the project

[remove 3](#) Removes the associated submission host from the project. Warning: "This will prevent submissions from this host. Are you sure you want to delete it?"

Buttons

Add Language Pairs Navigate to Add Language Pair screen. Implicitly saves changes.

Cancel** Discontinues setup of new project. Don't display after the project is irrevocably saved.

Save Save changes to this screen and navigate to Setup, update applicable info on Setup screen

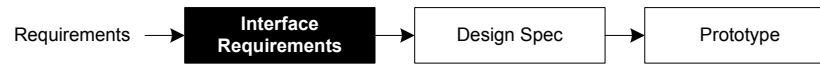
* = required field
** Action generates a warning (i.e., confirmation dialog box)

Notes

All required fields must be noted to the user. If this information is missing the the user must choose to complete the information or abort this project setup.

Some fields will not be re-editable: project number and client (disallow editing after first save, or after project is active?)

Adding Language Pairs is allowable, but removing language pairs is only allowable before that language pair has active documents running. After that point, do not display remove link!



Add Language Pair

Source Language

Pulldown-1 ▼

Target Language(s)

Select List-1 ▲

▼

(Multi select instructions)

add

Existing Language Pairs

Language [lp-LP] → Language [lp-LP]

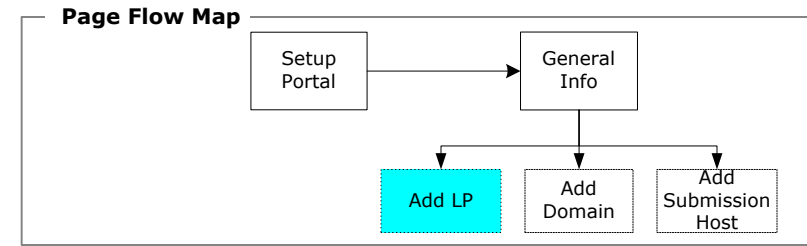
→ Language [lp-LP]

→ Language [lp-LP]

ok

Purpose

Add a source and target language pair.



Dynamic Data

Buttons

Add Repaint screen and add selected language (pair) to the existing language pairs for the project. If nothing is selected in both Pulldown-1 and Pulldown-2 give appropriate warning: "You must select a source and/or target language."

Ok Navigate to General Info screen.

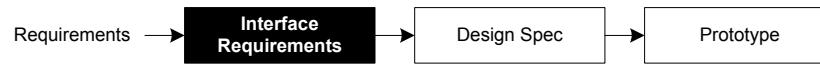
Pulldowns

Pulldown-1 List of all source languages. If there are 1 or more existing language pairs, this is displayed as plain text only, to prevent multiple source language selections.

Select List-1 List of all unassigned target language pairs

Notes

Pop up window (TBD)



Add Domains

Available Domains:

Select List-1 ▲

(Multi select instructions)

add

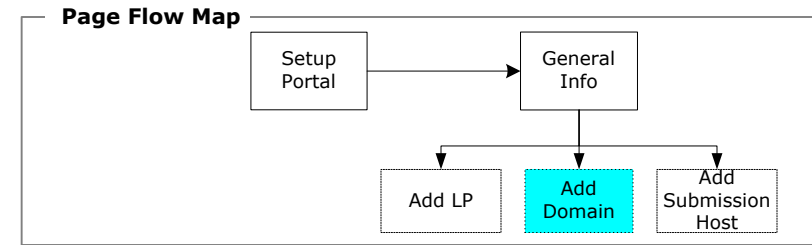
Existing Domains

- General
- Arts & Entertainment
- Medical

Ok

Purpose

Add domains of expertise.



Dynamic Data

Buttons

Add Repaint screen and add selected domain to the existing domains for the project. If nothing is selected in Select List-1 give warning: "You must select a domain to add."

Ok Navigate to General Info screen.

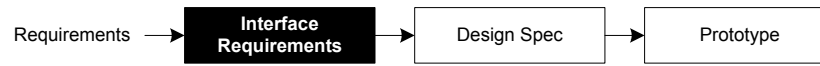
Pulldowns

Select List-1 List of all available domains

Notes

Pop up window (TBD)

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Add Submission Hosts

Submission Host IP Address: . . .

Existing Submission Hosts

127.0.0.1

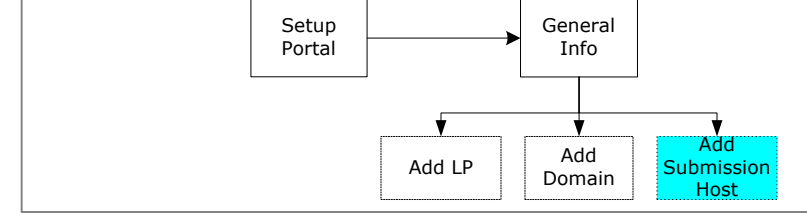
128.128.50.4

255.255.255.0

Purpose

Add submission host IP addresses.

Page Flow Map



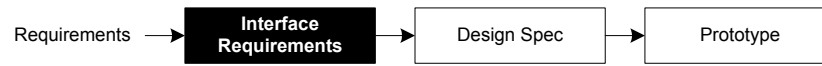
Dynamic Data

Buttons

- Ok Navigate to Project Summary screen
- Add Save changes to this screen. Validation will occur and may cause a warning requiring the user to do something.

Notes

Pop up window (TBD)



General Information Last Modified: MM-DD-YYYY

Workflows

Enable Classification

Text Files

Source Documents [view details](#) (last edited: MM-DD-YYYY)

Target Documents [view details](#) (last edited: MM-DD-YYYY)

Graphic Files

Source Documents [view details](#) (last edited: MM-DD-YYYY)

Target Documents [view details](#) (last edited: MM-DD-YYYY)

Other Files

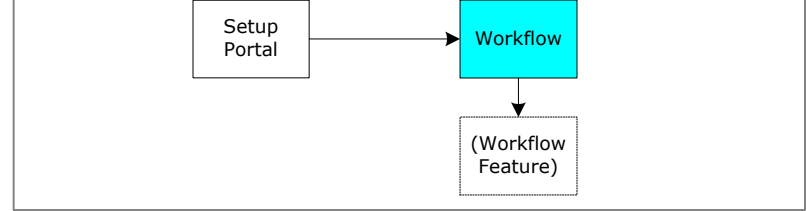
Source Documents [view details](#) (last edited: MM-DD-YYYY)

Target Documents [view details](#) (last edited: MM-DD-YYYY)

Purpose

Choose master workflows for each file type. Navigate to the workflow configuration and detail screens.

Page Flow Map



Dynamic Data

Links
[configure_workflow](#) --> Configure Workflow (for selected Workflow)
[view_details](#) --> View "All"/Master WF Details (for selected workflow)

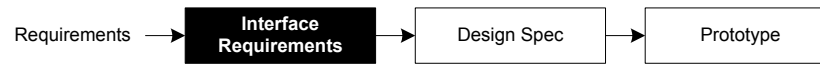
Buttons
Cancel: Navigate back to Setup screen without saving any changes
Save: Save changes to this screen, navigate to Setup screen, update applicable info on Setup screen

Pulldowns
Pulldown-1: Available Workflows

Notes

This is the first page of several pertaining to workflows. Please review documentation for Workflow Feature Team for further details.

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General Information Last Modified: MM-DD-YYYY

Schedule

select/unselect all

Tasks (Language Independent)

Task	Gate	Gate Comments	Due	Schedule Comments	Last Updated	
<input type="checkbox"/> Transcribe	Gated: New Deactivate	[user]: Comment with the comment on the comment.	02/03/2004	[user]: Comment with the comment on the comment.	02/03/2004	← active gate on new documents, due feb 3 2004
<input type="checkbox"/> FQA					not updated	← no schedule or gate

Tasks [for 1st target language, if more than one]

Task	Gate	Gate Comments	Due	Schedule Comments	Last Updated	
<input type="checkbox"/> Translate	Gated: New Deactivate	[user]: Comment with the comment on the comment.	02/03/2004	[user]: Comment with the comment on the comment.	02/03/2004	← active gate on new documents, due feb 3 2004
<input type="checkbox"/> Edit					not updated	← no schedule or gate
<input type="checkbox"/> Proof			6 Hour Turnaround	[user]: Comment with the comment on the comment.	02/03/2004	← no gate, due 6 hours after receipt

Tasks [for 2nd target language, if more than one]

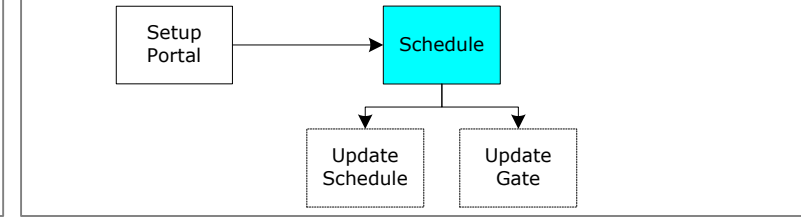
Task	Gate	Gate Comments	Due	Schedule Comments	Last Updated	
<input type="checkbox"/> Translate			14:45 Daily	[user]: Comment with the comment on the comment.	not updated	← no gate, due at 2:45pm daily
<input type="checkbox"/> Edit					not updated	← no schedule or gate
<input type="checkbox"/> Proof	Gated: All Activate	[user]: Comment with the comment on the comment.			02/03/2004	← inactive gate on all documents, no schedule

select/unselect all

Purpose

Project schedule "dashboard" view. View set schedules and gates, navigate to add/modify schedules/gates. Activate and deactivate gates.

Page Flow Map



Dynamic Data

Buttons

- update schedule** Navigate to Update Schedule screen. If nothing selected warning: "You must first make a selection."
- update gate** Navigate to Update Gate screen. If nothing selected warning: "You must first make a selection." Not displayed unless user is a PM.
- Done** Navigate to Setup, update applicable info on Setup screen

checkboxes

Task Checkboxes Checkboxes are only displayed next to tasks which that user has permission to edit (i.e. all tasks for a PM, only unedited tasks for role managers)

Links

Activate/Deactivate Immediately toggle the gate value for this task, repaint the screen, and change the link to the opposite.

Notes

Any tasks for which a user has permission to edit will be displayed on this screen. If the project has multiple language pairs and the user has permission to edit more than one, tasks will be organized by language pair.

Gated field is only editable by a PM. If user is not a PM, display text "yes" or "no" to indicate PM's choice.

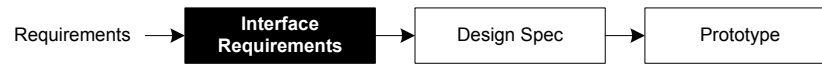
Gates are indicated by all/new documents, with a link to activate or deactivate. If the gate is inactive the words "Gate: new/all" should be in a muted color.

Schedule comments are prefaced with the user that set the schedule or gate.

Future enhancement: allow sorting by column.

Clemson would like to see the ability to notify the PM that a set schedule is unreasonable (or possibly reject it)

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Update Schedule

Select the due date/time:

Date
(xx/xx/xxxx)

Time (Daily)

Days After document receipt

Hours After document receipt

Schedule Applies to

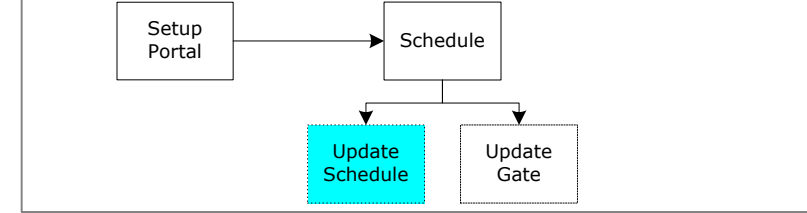
- Translate Language [lp-LP]
- Edit Language [lp-LP]
- QA Language [lp-LP]

Comments

Purpose

Modify schedule for associated tasks.

Page Flow Map



Dynamic Data

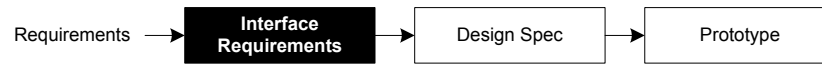
Buttons

- Cancel** Navigate back to Schedule screen without saving any changes
- Save** Save changes to this screen, navigate to Schedule screen. Validate date inputs if non-empty. If invalid give warning: "The [field] is invalid. Your entry must be of the form [xxxxxx]" and focus on the offending form input.
- Calendar** open calendar widget to populate date.

Notes

If this schedule change is being applied to multiple selections and they match, this form should be prepopulated, otherwise leave it blank.

Pop up window (TBD)



Update Gate

[delete gate](#)

Apply to All Documents New Documents Only

Comments

Gate Applies to

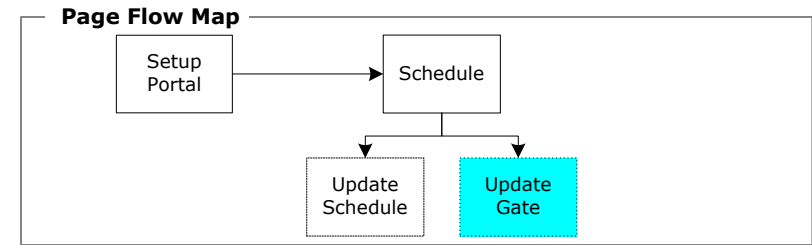
Translate	Language [lp-LP]
Edit	Language [lp-LP]
QA	Language [lp-LP]

cancel

save

Purpose

Modify/delete gates for associates tasks.



Dynamic Data

Buttons

Cancel	Navigate back to Schedule screen without saving any changes
Save	Save changes to this screen, navigate to Schedule screen.

Radio Buttons

All/New documents Apply gate to selected.

Links

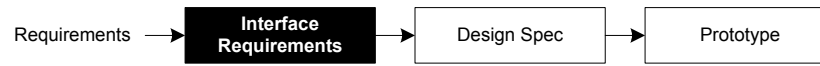
Delete Gate	Permanently remove the gate and navigate back to Schedule screen.
-------------	---

Notes

If this schedule change is being applied to multiple selections and they match, this form should be prepopulated, otherwise leave it blank.

Pop up window (TBD)

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General Information
Last Modified: MM-DD-YYYY

Manager Assignments

select/unselect all change manager for selected

Managers for Language Independent Roles

Role	Role Manager	Vendor	
<input type="checkbox"/> GE	egibb	Random Translation Services	view manager history
<input type="checkbox"/> LE	egibb	eTranslate SF	view manager history
<input type="checkbox"/> FQA	egibb	etranslate SF	view manager history

Managers for Chinese Roles

Role	Role Manager	Vendor		
<input type="checkbox"/> Style Guide Manager	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Glossary Manager	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Translate	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Edit	egibb	eTranslate SF	view manager history	
<input type="checkbox"/> Proof	egibb	etranslate SF	view manager history	

Managers for Japanese Roles

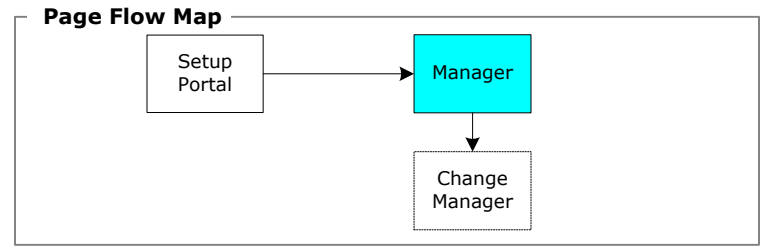
Role	Role Manager	Vendor		
<input type="checkbox"/> Style Guide Manager	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Glossary Manager	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Translate	jjohnson (delegate)	Random Translation Services	view manager history	assign to me
<input type="checkbox"/> Edit	egibb	eTranslate SF	view manager history	
<input type="checkbox"/> Proof	egibb	etranslate SF	view manager history	

select/unselect all change manager for selected

cancel
done

Purpose

View roles and the assigned managers. "Undelegate" assignments back to self. Select roles and navigate to change manager screen.



Dynamic Data

Links

- [user](#): Display default manager name and link to user summary
- [vendor](#): Display default manager's vendor and link to vendor summary
- [view management details](#): Navigate to Project Summary and scroll to management path section
- [assign to me](#): Revert the delegation back to current user and repaint the screen.

Buttons

- change manager**: Navigate to Change Manager and apply manager changes to all selected roles. If nothing selected warning: "You must first make a selection."
- Cancel**: Navigate back to Setup screen without saving any changes
- Done**: Navigate to Setup, update applicable info on Setup screen. If management has been delegated to an external vendor, this user has responsibilities, and any vendor rates have not been set, warning: "Some of the work for this project has been outsourced. You may designate rates for a vendor on the main Project Setup page."

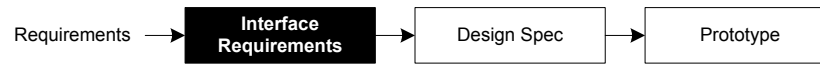
Notes

Possible Enhancement: it may be possible to sort by manager, language pair, vendor, role, whatever to make group selections simpler... could also be used to imply groups without having to save them.

Change manager and undelegate controls should be repeated at top and bottom of page, to ensure they can be viewed easily. The controls need to be easily distinguished from the many other controls on this page -- particularly save/cancel.

Delegated management responsibilities should be noted prominently. I recommend the addition of "delegate" text next to the manager name as well as use of italic or some other visual cue.

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Manager Assignments

View qualified managers from:

choose a manager from [My Vendor](#):

delegate (vacation, temp, etc.)
 reassign (permanent, no view, etc.)

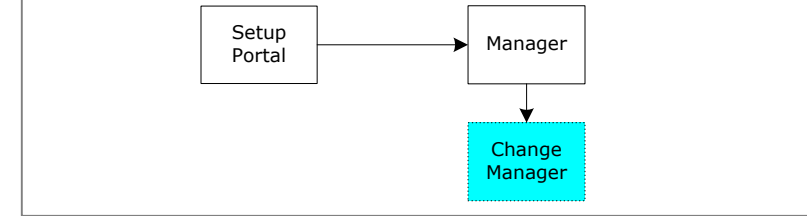
Manager for These Roles

Japanese (ja-JP)	Translate
French (fr-FR)	Edit
Language (la-LA)	QA

Purpose

Select the vendor and user to manage associated roles. Select delegation or reassignment.

Page Flow Map



Dynamic Data

Buttons

Cancel
Save

Navigate back to Manager screen without saving any changes
Save changes to this screen. If the selected manager is at the current user's vendor navigate back to Manager screen. If selected user is at an external vendor navigate to Assign Vendor Rates screen.

Radio Buttons

delegate/reassign

Determines management behavior. If not PM and reassigning, warning cancel/confirm "If you reassign this management responsibility you will be unable to make changes to it later."

Pulldowns

My Vendor

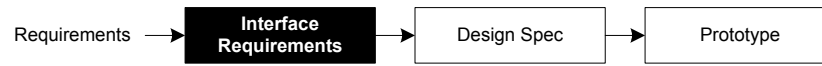
A list of qualified vendors. The default is always the current user's vendor. Repaint screen and update Vendor's Users pulldown if this pulldown is changed from its loaded value.

Vendor's Users

List of qualified users from the vendor chosen in the My Vendor pulldown. Default is the current manager. After the My Vendor menu has been changed, the default is either "-- Select a Manager --" or a user/system specified default vendor manager (future enhancement?)

Notes

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Management History of Role (Language (lp-LP)) on [Project Name] Project

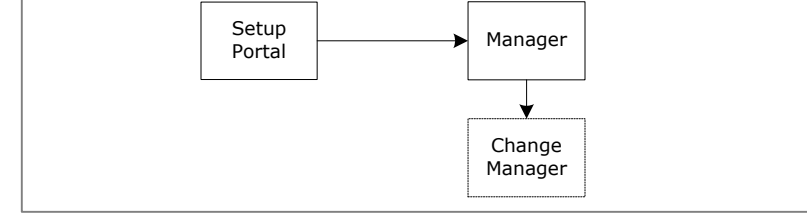
Manager	Vendor	Assignment Date	
jjohnson	Random Translation Services	MM/DD/YYYY	reassigned to
jdoe	eTranslateSF	MM/DD/YYYY	delegated to
jmuir	eTranslateSF	MM/DD/YYYY	delegated to
suzyq	Random Translation Services	MM/DD/YYYY	reassigned to
jjoe	Random Translation Services	MM/DD/YYYY	

cancel save

Purpose

View manager assignment history for a role by date.

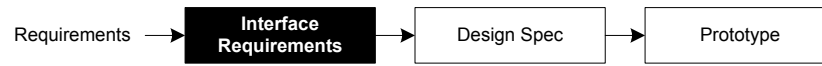
Page Flow Map



Dynamic Data

Notes

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General Information Last Modified: MM-DD-YYYY

Rates for Vendor (Target Language Ip-LP)

- Existing interface*
- Add a new Rate
 - Existing Rates
 - Default Rates
 - Other Rates

add this button to existing interface →

Ok

Purpose

View/Modify Vendor rates. (Uses pre-existing functionality)

Page Flow Map



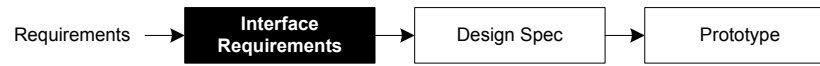
Dynamic Data

Buttons

Ok Return user to the Setup Page

Notes

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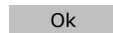


Service Rate For *Vendor* (Target Language Ip-LP)

Existing interface



selectively add this button →



Purpose

View/Modify Vendor rates. (Uses pre-existing functionality)

Page Flow Map



Dynamic Data

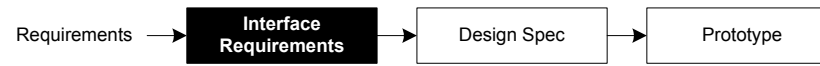
Buttons

Ok Return user to the Setup Page

Notes

Application of the "ok" button is a mystery at this point. It should be added to the end of any interaction on this screen which Ultra considers complete

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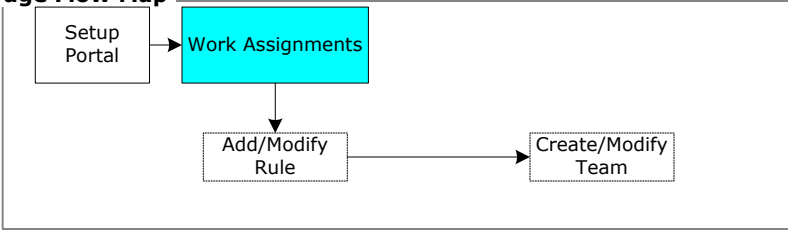


General Information		Last Modified:	MM-DD-YYYY
Work Assignments			
Language [lp-LP] (1st if user has more than one for this project) etc. etc.			
<input checked="" type="radio"/> Translate	<input type="radio"/> Assign Documents by Rules	<input type="radio"/> Assign Documents Manually (hide rules)	<input type="button" value="Add Rule"/> <input type="button" value="Run These Rules"/>
Rule 1	If [xyz is true] assign to Team foo (N users)		modify rule/team remove rule ▼
Rule 2	If [xyz is true] assign to Team bar (N users)		modify rule/team remove rule ▲ ▼
Rule 3	If [xyz is true] assign to Team foobar (N users)		modify rule/team remove rule ▲
Otherwise		assign to Qualified Team 3 (N users)	modify rule/team
<input checked="" type="radio"/> Edit	<input type="radio"/> Assign Documents by Rules	<input checked="" type="radio"/> Assign Documents Manually (hide rules)	
		You may manually assign documents to members of the Default Team (N users)	modify team
<input checked="" type="radio"/> Proof	<input type="radio"/> Assign Documents by Rules	<input type="radio"/> Assign Documents Manually (hide rules)	<input type="button" value="Add Rule"/> <input type="button" value="Run These Rules"/>
		All documents will be assigned to the Default Team (N users)	modify rule/team
Language [lp-LP] (2nd if user has more than one for this project) etc. etc.			
etc...			
Language [All] (For language independent roles/tasks) etc. etc.			
etc...			

Purpose

Choose document allocation by rule or manual assignment. Add/Remove/Run/Enumerate rules, navigate to modify team.

Page Flow Map



Dynamic Data

Links

- [modify rule/team](#) Navigate to Add/Modify Rule
- [modify team](#) Navigate directly to Create/Modify Team screen
- [remove rule](#) Delete this rule. Warning: "Are you sure you want to remove this rule?"
- [Team Foobar](#) Navigate to team summary.

Buttons

- Cancel Navigate back to Setup screen without saving any changes
- Save Save changes to this screen and navigate to Setup
- Add Rule Navigate to the Add/Modify Rule screen (not shown if "Assign documents by hand" radio button is active)
- up Move the rule up in the execute order list (not available on first user created rule). Repaint screen.
- down Move the rule down in the execute order list (not available on last user created rule). Repaint screen.
- Run These Rules Run existing/active rules for this task/LP. Only displayed on rule based tasks. When a user runs rules and the screen repaints the label should read "Run Rules Again" to provide feedback.

Radio Buttons

- Assign documents by rules Show rules -- repaint screen
- Assign documents manually Hide rules (**rules must be saved... i.e. repopulate all rules if user switches between assign by rules/by hand**) Repaint screen.

Notes

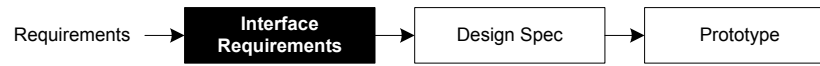
When Assign by rule is active all rules are displayed and the add rule button is present. If Assign by hand is active the rules must be saved and hidden from the user. The add rule button is hidden as well. If the user chooses Assign by rules at any point later, the rules she created must be reinstated in the state they were last saved.

The fallback/"All"/"Otherwise" rule is non-removable and is always shown last in the list of rules. If it is the only rule it should be displayed "All documents will be assigned to"... if it isn't the only rule, it should be displayed "Otherwise assign to". Default team for this is always Default team.

If the default team is comprised of 0 members, it should be displayed prominently (i.e. color, text style)

● =a named anchor. When the page is forced to repaint (eg Run These Rules), or the user returns here from another page (eg add/mod rules) the point of return should be whichever LP/Task set was being acted upon.

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Add/Modify Work Assignment for [Task] (Target Language if user has more than one)

1) Create the rule for documents:

- if
- if domain of expertise is
- if document was submitted between dates and
- if document was submitted between the hours of and

2) and decide what to do with matching documents:

Assign manually to any team or person
Assign manually to a specific team:
Assign automatically to a specific team:

- Default Team**
 - [qualifiedUser1](#) [qualifiedUser5](#)
 - [qualifiedUser2](#) [qualifiedUser6](#)
 - [qualifiedUser3](#) [qualifiedUser7](#)
 - [qualifiedUser4](#)

- Qualified Team 1** [modify this team](#)
 - [qualifiedUser1](#) [vendor](#)
 - [qualifiedUser2](#) [vendor](#)
 - [qualifiedUser3](#) [vendor](#)
 - [qualifiedUser4](#) [vendor](#)

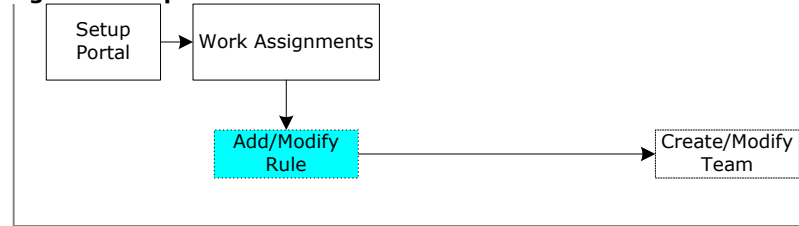
- Qualified Team 2** [modify this team](#)
 - [qualifiedUser1](#) [vendor](#)
 - [qualifiedUser2](#) [vendor](#)

Or Create a New Team

Purpose

Create a document rule (filter) and allocate to a default/existing team or navigate to create team screen.

Page Flow Map



Dynamic Data

Buttons

- Cancel: Navigate back to Work Assignments screen without saving any changes
- Save: Check team and assignment choices, save changes and navigate to Work Assignments.
- cal: Open calendar pop-up
- Create New Team: Save changes and navigate to Create/Modify Team screen.

Pulldowns

- Path: One of: ...
- equals: One of: ...
- General: List of domains this project has been decorated with
- Pulldown-1: List of hours
- Pulldown-2: Affects team/user choice when assigning manually from a document browser. If Task is manual, default menu item is "manual any". Otherwise, default is "automatic team"

Links

- [Modify this team](#): Navigate to Create/Modify team screen populated with chosen team
- [vendor](#): Navigate to vendor summary.
- [user](#): Navigate to user summary (always display linked vendor with user)
- [team](#): Navigate to team summary.

Radio Buttons

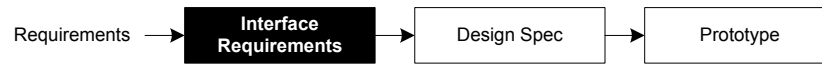
- Team Foo: Indicates which team will be assigned.

Notes

If this is the fallback rule REMOVE ALL OF SECTION 1)

If the default team has 0 members, display warning instead of section 2): "There are no users that can fulfill this task. You can create or modify users in the [Users](#) section of the application."

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Add/Modify Team [for [Task] (Target Language if user has more than one)]

Team Name

<input type="checkbox"/> select/unselect all	Assigned Users	Vendor	Has documents checked out for this task/Lang?
<input checked="" type="checkbox"/>	qualifiedUser1	Vendor	n
<input checked="" type="checkbox"/>	qualifiedUser2	Vendor	n
<input type="checkbox"/>	qualifiedUser3	Vendor	n
<input type="checkbox"/>	qualifiedUser4	Vendor	n
<input checked="" type="checkbox"/>	qualifiedUser5	Vendor	y
<input checked="" type="checkbox"/>	qualifiedUser6	Vendor	y
<input checked="" type="checkbox"/>	qualifiedUser7	Vendor	y

← list of users within my vendor

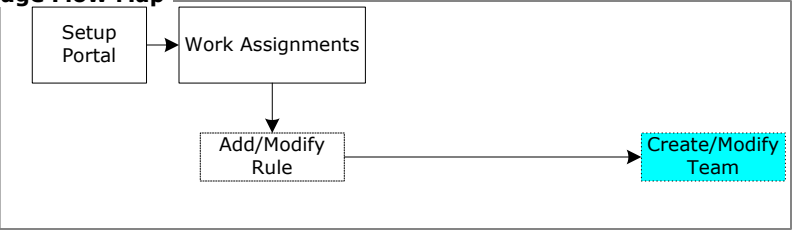
<input checked="" type="checkbox"/>	qualifiedUser1	External Vendor	n
<input checked="" type="checkbox"/>	qualifiedUser2	External Vendor	n
<input type="checkbox"/>	qualifiedUser3	External Vendor	n
<input type="checkbox"/>	qualifiedUser4	External Vendor	n
<input checked="" type="checkbox"/>	qualifiedUser5	External Vendor	y
<input checked="" type="checkbox"/>	qualifiedUser6	External Vendor	y
<input checked="" type="checkbox"/>	qualifiedUser7	External Vendor	y

← list of users in external vendors.

Purpose

View all users qualified for a task and enable/disable these users to create a named/saved team.

Page Flow Map



Dynamic Data

Buttons

Cancel Navigate back to Add/Modify Rule screen without saving any changes
Save Save changes. Navigate to screen of origin.

Links

[user](#) Navigate to user summary
[Vendor](#) Navigate to vendor summary

Notes

Pop up window (TBD)

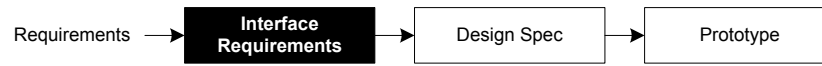
team name should be Target Language + Role + # by default, but prepopulate to actual team name when modifying.

"Checked out docs" info is future enhancement. For now, current user can remove a user from the team which means no FUTURE docs go to that user on this team, but existing docs stay (unless current user explicitly does an uncheckout)

checked out documents is yes/no docs checked out for this user/team/role 'pair'. Using a number of documents will imply that its some sort of resource utilization metric, which is why I removed it for now.

Questions: Do team members know they are part of a team? Do they know who else is on their team? can they contact eachother either anonymously or directly? Can the manager send a message to a team?

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Team Name (qualified for Language Pair Role)

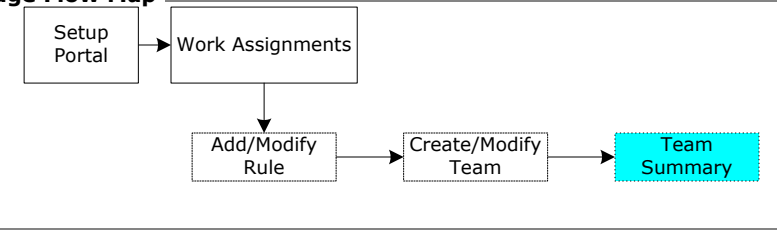
[qualifiedUser1](#) [vendor](#)
[qualifiedUser2](#) [vendor](#)
[qualifiedUser3](#) [vendor](#)
[qualifiedUser4](#) [vendor](#)

cancel save

Purpose

View members of a team.

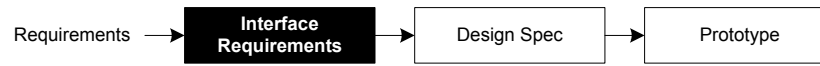
Page Flow Map



Dynamic Data

Notes

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Add/Modify Instructions for Language (lp-LP)

File Path and Name:

Existing Instructions

filename.ext

Purpose

Browse local hard drive for a file and upload it as an instruction document.

Page Flow Map



Dynamic Data

Buttons

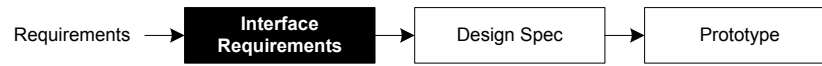
- choose file
- save
- cancel

Do http file upload functionality stuff :-)
If an instructions doc already exists, cancel/confirm "Saving this file will overwrite the previous version. Are you sure you want to continue?"
Navigate to Setup screen.

Notes

Pop up window (TBD)

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Add/Modify Style Guide for Language (lp-LP)

File Path and Name:

Existing Style Guide
filename.ext

Purpose

Browse local hard drive for a file and upload it as a style guide document.

Page Flow Map



Dynamic Data

Buttons

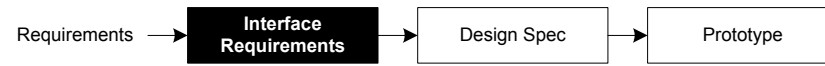
choose file
save
cancel

Do http file upload functionality stuff :-)
If a style guide already exists, cancel/confirm "Saving this file will overwrite the previous version. Are you sure you want to continue?"
Navigate to Setup screen.

Notes

Pop up window (TBD)

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Add/Modify Glossary for Language (lp-LP)

File Path and Name:

Existing Glossary
filename.ext

Purpose

Browse local hard drive for a file and upload it as a glossary document.

Page Flow Map



Dynamic Data

Buttons

choose file
save
cancel

Do http file upload functionality stuff :-)
If a glossary already exists, cancel/confirm "Saving this file will overwrite the previous version. Are you sure you want to continue?"
Navigate to Setup screen.

Notes

Pop up window (TBD)

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